



# Disabled consumers' ownership of communications services

A Consumer Experience report

Research Document

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## Section 1

# Introduction and methodology

## Background

Nearly twelve million (11.9 million) people in the UK have a limiting long-term illness, impairment or disability<sup>1</sup>. Under the Communications Act 2003 Ofcom has a specific duty to have regard to the interests of disabled consumers. In order to meet these responsibilities and to respond to stakeholder requests for better information on the experiences of disabled consumers, we worked with the British Population Survey (BPS)<sup>2</sup> to produce this report. It provides Ofcom's most robust analysis yet of disabled consumers' household ownership of, and access to, communications services, across Great Britain.

Ofcom's previous quantitative analysis (published as part of the *Consumer Experience* report) was caveated due to small sample sizes. While combining the results from people with different types of impairment increases the sample sizes, this approach masks any differences between disability groups, and as such, more in-depth research was desirable.

By working with the BPS we have achieved a robust sample of disabled consumers (4,095 people aged 15 or over). This has meant that, for the first time, we are able to publish quantitative analysis comparing household ownership and use of communications services among people with different types of impairment or disability. The top-line findings were published in Ofcom's *Consumer Experience of 2012* report<sup>3</sup>.

This report provides a detailed analysis among people with hearing, visual, mobility and multiple impairments, making comparisons by type of disability and by demographic group. It draws out differences between disability groups and makes comparisons with non-disabled consumers.

Previously, this type of analysis has been limited by the fact that observed differences between groups of disabled consumers can be explained by the substantial demographic differences between the groups. The analysis in this report is unique in that it compares different age and social groups on a like-for-like basis. The findings suggest that demographic differences offer only a partial explanation for the differing levels of communications service take-up. Other factors, perhaps related to the disability itself, appear to be affecting ownership and use of key communications services, or compounding the effects of age and socio-economic group among people with disabilities.

The findings from this report will help inform all areas of Ofcom's work relating to the needs of disabled consumers. It complements our existing research which looks more broadly at service affordability and media literacy in the UK population. The results will allow us more accurately to identify and prioritise potential areas of concern for Ofcom and/or other stakeholders.

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<sup>1</sup> Family Resources Survey 2011/12: <https://www.gov.uk/government/publications/family-resources-survey-201112>

<sup>2</sup> British Population Survey: <http://www.thebps.co.uk/>

<sup>3</sup> Ofcom *Consumer Experience of 2012* (pp70-74): <http://stakeholders.ofcom.org.uk/market-data-research/market-data/consumer-experience-reports/consumer-experience/>

## The scope

This report compares the profiles of people with different types of disability: their households' ownership of, and their use of, communications services, i.e. fixed line, mobile and PC ownership, and levels of internet access.

In summary, the report covers the following areas:

**Profile of disability groups** – an overview of the demographic profiles of disability groups, including age, socio-economic group, employment status and household size.

**Ownership overview** - an overview of the services disabled consumers have access to in their homes, and the frequency with which they access the internet.

**People with mobility impairments** – a detailed analysis of the services and devices people with (only) mobility impairments have access to in the home, and more information on the impact of demographics. Types of mobility impairment are broken down further in this section.

**People with hearing impairments** – a detailed analysis of the services and devices people with (only) hearing impairments have access to in the home, and more information on the impact of demographics.

**People with visual impairments** – a detailed analysis of the services and devices people with (only) visual impairments have access to in the home, and more information on the impact of demographics.

**People with multiple impairments** – a detailed analysis of the services and devices people with multiple impairments have access to in the home, and more information on the impact of demographics. By 'multiple impairments' we mean any combination of mobility, hearing and visual impairment. Types of multiple impairment are broken down in this section.

This report uses unweighted data and examines disabled consumers with each type of disability, as well as people with a combination of disabilities. We make comparisons to the total disabled sample (which includes people with other non-specified disabilities) and the total non-disabled sample. We decided to isolate people with single ('solus') impairments from those with multiple impairments in order to understand the impact of the specific disability type on ownership and use of communications services.

**Note:** Where the report refers to mobility, hearing or visual impairment, this is always a solus impairment rather than part of a wider condition with other impairments.

## Methodology

The British Population Survey (BPS) is a face-to-face nationally representative survey which interviews approximately 2,000 people aged 15+ across Great Britain each week.

Ofcom commissioned a question on the BPS survey between July and September 2012, asking respondents whether they considered themselves to have a disability or long-term illness that affected their day-to-day lives and, if so, what type of disability they had: mobility impairment (wheelchair user, unable to walk far or limited reach); visual disability; hearing disability; or other.

The survey includes questions on access to the following communications services and devices: fixed-line and mobile telephony (including smartphone); internet (in-home and

anywhere, including mobile access); DAB radio; pay TV (cable or satellite); and Freeview or Freesat. In addition, the following supplementary questions were asked of those with internet access: length of time with internet access; frequency of internet use; and types of uses. A full list of questions is contained in Annex 1.

## Sample

A total of 4,095 disabled people (self-defined) was achieved, and a total sample of 17,412 non-disabled people. The total proportion of disabled people equates to 19% of the sample of GB adults aged 15 and over.

Thirteen per cent of the total sample aged under 65 classified themselves as disabled compared with 40% of those aged 65 and over and 53% of those aged 75 and over.

Of those who self-reported a disability, 28% of the sample had mobility impairment only; 12% had a hearing impairment only, 9% had a visual impairment only and 25% had some other disability as their only disabling condition. The sample included people who had multiple impairments; 16% had a combination of mobility, visual and/or hearing disabilities and 26% of the sample had multiple impairments including 'other impairments'. Please note that this report focuses on the discrete groups of people with solus mobility, hearing or visual impairments, and on people with a combination of these impairments.

The overall incidence figures show a similar pattern to the Family Resources Survey<sup>4</sup> 2011/12 which found that nearly 12 million people self-reported as being disabled (c. 19% of the population) and that the most commonly reported impairments are those that affect mobility, lifting or carrying.

## Statistical reliability

For reporting purposes, sub-group differences are noted in the report only when they are significantly different from the total sample or subgroups within the sample. We have reported differences at the 95% confidence interval; this means that if you asked 100 people in the population, 95 of them would give a similar response to the finding reported.

Low sample sizes (i.e. between 50 and 100 respondents) were achieved for some demographic groups for some metrics. Where this is the case, we have highlighted that the data should be treated as indicative only, as they are subject to high margins of error.

Insufficient sample sizes (i.e. fewer than 50 respondents) have not been reported.

## Caveat

When reading this report it is important to be aware of the limitations of the data.

The survey on which this report is based primarily asks questions about services and devices present in the home, and therefore represents ownership within the household. It is not possible, from this dataset, to report *use* among the disabled population. Differences between single and multiple-person households can provide an indication of use among the disabled population particularly given that 40% of disabled people live alone.

The survey did not contain any questions about the severity of the impairment.

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<sup>4</sup> <https://www.gov.uk/government/publications/family-resources-survey-201112>

The analysis focuses on people with hearing, vision or mobility impairments only, and people with a combination of any of these impairments. The data cannot provide analysis of other disabilities such as learning disabilities. Disabilities other than those included in the analysis are contained within the total disabled population and are reported only at that level.

## Section 2

# Executive summary

This report contains a range of detail on disabled consumers' take-up and use of communications services and devices.

The analysis suggests that demographic differences offer only a partial explanation for differing levels of communication service take-up. Other factors, perhaps related to the disability itself, may affect ownership and use of key communications services such as the internet by people with disabilities, or may compound the effects of the demographic differences.

The degree to which other factors affect ownership among disabled consumers varies by service and by type of disability.

The following is a summary of the key trends and highlights from the report:

### Profile of disability groups (page 13)

- **People with mobility or multiple impairments have the oldest profiles.** The research confirms the strong correlation between disability and age. Three in ten (28%) disabled people are aged 75+, compared to 6% of non-disabled people. Half (49%) of all people with multiple impairments and a third (32%) of people with a mobility impairment are aged 75 or over.
- **Disabled people are more likely to live alone, particularly those with mobility or multiple impairments.** Forty per cent of people with a disability live alone, compared with 16% of non-disabled people. The figure for people with mobility impairment is 47% and for those with multiple impairments is 44%. This may reflect the older age profile of these groups of people.
- **Households with people with mobility or multiple impairments are more likely than non-disabled households to be C2DE.** Three in five (60%) households with disabled people with multiple impairments are C2DE, compared to 46% among non-disabled households. The proportion of C2DE homes rises to 66% among those with people with mobility impairments. People with visual or hearing impairments have a similar socio-economic group profile to non-disabled people.
- **People with mobility or multiple impairments are also the least likely to be in employment.** About one in ten people with mobility impairment (10%) or multiple impairments (8%) are employed, compared with the disabled average of 17%. Among people aged under 65, those with a mobility impairment (36%) or multiple impairments (42%) are more likely to say they are 'not working due to disability or long term illness' compared with the disabled average (29%).

### Take-up of services and devices – overview (page 20)

#### Overview

- **Ownership of communications services is generally lower among people with a disability than among those without, particularly for internet access.** The exception to this is fixed-line telephony, which among people with a disability is equal



to or higher than the non-disabled average. The biggest gap in ownership of communications services, between people with and without a disability is for internet access (55% and 83% respectively).

- **There are indications that disability may be limiting ownership and access to communications services.** Demographic differences explain many of the differences in ownership and access levels among disabled consumers compared to non-disabled. But there are variations of service ownership within common demographic groups which suggest that aspects other than age and socio-economic group are limiting ownership, or at least compounding the effects of these demographics. There are variations across different groups of disabled consumers and variations by service/device, which are explored in more detail below.
- **Ownership of communications services and devices is highest among disabled people with hearing or visual impairments.** People with hearing or visual impairments report comparable or higher levels of ownership of most services/devices to the average for disabled consumers. For hearing-impaired people, average ownership levels are driven up by the higher proportion in socio-economic groups ABC1, and for people with visual impairments higher ownership is linked to their younger profile and larger household size.
- **Disabled people in employment are as likely as employed non-disabled people to own, or have access to, most communications services.** Disabled people in employment have higher-than-average ownership of all services, compared to the average for disabled people. For example, mobile ownership stands at 91% among employed disabled people and smartphone ownership at 58%; this compares to 81% and 27% average among all disabled consumers. Similarly, internet access among disabled people in employment is higher, at 87% compared to 55% among the total sample of disabled people and 83% among non-disabled consumers.

## Internet

- **Factors other than age and SEG limit internet access for all except young ABC1 disabled people.** Age and income clearly affect levels of internet access among disabled people, as they do for non-disabled people, but other factors, perhaps related to the disability, are further limiting access for some. The greatest differences are noted among C2DEs, and some of this may be explained by the higher proportion in socio-economic group E. There are variations by type of disability.
- **Lower internet access among people with hearing impairment can largely be explained by their differing demographic profile.** The impact of factors other than age and SEG vary by disability group, with these less evident among people with hearing impairment. This suggests that on the whole the lower ownership at an aggregate level among people with hearing impairment can be explained for by their differing demographic profile.
- **For people with mobility and multiple impairments levels of internet access remain significantly lower than among non-disabled people** even when comparing the same combined age and socio-economic groups. This suggests for these consumers other factors are coming into play or at least compounding the effects of age and income.
- **Home PC ownership is lower among disabled than non-disabled people.** Around three in five (59%) disabled people live in a house with a PC, compared with

just under four in five (79%) non-disabled people. PC incidence levels are higher among younger adults and decrease with age, regardless of disability.

- **Internet access is broadly similar for 15-34 year olds, regardless of whether or not they have a disability.** Ninety per cent of disabled people under 35 have internet access, compared with 93% of non-disabled adults. From the age of 35 differences in access levels develop, with the exception of people with hearing impairment. Internet access among this group is comparable to non-disabled adults regardless of age.
- **Disabled people are less likely to access the internet outside the home or via mobile devices, and tend to be lighter users.** Almost all internet users said they access the internet at home. Disabled people are less likely to access it in other locations (19%) or via a mobile device (23%) than are non-disabled people (36% and 35% respectively). Most disabled and non-disabled internet users say they use the internet daily or more often, although the incidence of this is lower among disabled people, at 73% and 85% respectively. Internet users with visual impairment access the internet most frequently: 81% claim to do so at least once a day.

## Telecoms

- **Fixed-line ownership is higher among people with a disability; this is driven by the older age profile and higher ownership among people aged 55+.** Nearly four in five (79%) people with a disability have access to a landline at home, compared with 74% of people without a disability. However, fixed-line ownership is generally lower among people aged 15-54 with a disability compared to ownership among this age group without a disability. Household ownership is higher among those aged 55+ for all disability groups.
- **Mobile home access levels are higher among disabled people aged 15-34 (92%) than among non-disabled adults in the same age group (87%).** However, Smartphone ownership is lower among people with a disability than those without: 27% compared with 48%. However, age plays a large role. Ownership among younger disabled people (68%) is higher than among non-disabled people in this age group (62%). Between the ages of 35-64 smartphone ownership among disabled people drops below that of non-disabled people. There are also differences by impairment type; people aged 35-64 with a hearing impairment (66% among those aged 35-54 and 40% among those aged 55-64) are more likely than other disabled people, and also than non-disabled people (57% and 35% respectively), to have a smartphone at home.
- **Factors other than age and SEG may be limiting mobile ownership, but to a lesser extent than for the internet.** The gaps in smartphone home ownership levels between disabled and non-disabled consumers within each age band by SEG are relatively small compared to the total market. These range from one to eight percentage points lower among disabled consumers.

## People with mobility impairments (page 38)

- **People with mobility impairments have lower levels of smartphone, PC and internet access.** Ownership of many communications services is lower among disabled consumers, and for PC, smartphone and internet access the levels are lower still among people with mobility impairments.

- **Wheelchair users are the most likely to own or have access to each of these services/devices, but internet access remains low in comparison to non-disabled people.** The higher ownership of communications services, compared to that among people with other types of mobility impairment, may be a reflection of the larger household size and younger age profile of wheelchair users. Internet access, however, remains relatively low even among this group - 53% compared to 83% among non-disabled people.
- **Internet access levels are lower for all SEG bands among people with mobility impairment.** AB adults with mobility impairment have the highest incidence of internet access: 66% compared with the average for non-disabled AB consumers of 94%.
- **The gap in internet access between non-disabled people and those with mobility impairment is lowest among ABC1s aged under 65, at 96% vs. 89%.** However, among all C2DEs, and ABC1s aged over 65, the gap in access levels is significantly higher; at least 18 percentage points. This suggests that other factors, including disability, may be compounding the effects of age and income on internet access levels.
- **People with mobility impairments are lighter users of the internet** – seven in ten users use the internet at least daily. This compares to 85% among people without a disability.
- **Broadly comparable levels of pay-TV ownership exist among people with mobility impairment, compared to non-disabled consumers.** Age clearly influences the services people choose, with younger people more likely to have pay TV.

## People with hearing impairments (page 55)

- **People with hearing impairments are more likely than those without a disability to own a fixed line, and have comparable levels of DAB ownership.** People with a hearing impairment have higher levels of ownership of most services, compared to people with other types of disability or impairment. Internet access, home fixed line, and DAB ownership are all higher than the disabled average among people with a hearing impairment. Fixed-line ownership is higher among those with a hearing impairment compared to non-disabled people.
- **Lower aggregate internet access levels are largely explained by the varying demographic profile of people with a hearing impairment.** However, for some older people with a hearing impairment factors other than age and income may be further limiting this. Among ABC1s aged under 65, internet access is broadly comparable regardless of disability and not significantly different for C2DEs in this age band. However, differences (less prominent than other disability groups) are noted among the older sample across both broad SEG groups.
- **People with hearing impairments have relatively high levels of home landline, mobile phone and smartphone ownership.** Smartphone ownership is broadly comparable within each of the broad SEG groups among those aged under 65, when comparing those with a hearing impairment to non-disabled people.
- **Pay-TV levels are relatively high in homes with hearing-impaired adults.** Ownership is higher than the average among non-disabled people, across all age

bands and household sizes, with the exception of single-person households, where pay TV is less prominent among those with a hearing impairment.

## People with visual impairments (page 65)

- **People with a visual impairment have higher ownership levels of some devices and services than the average across the total disabled sample.** People with a visual impairment have higher levels of home smartphone ownership (33%), home PC ownership (65%) and personal internet access (62%) than the average among disabled people (27%, 59% and 55% respectively). This can partly be explained by their larger household size, although the levels remain lower than the average for non-disabled consumers.
- **Factors other than age and SEG play a role in limiting internet access for some people with a visual impairment.** Despite higher levels of internet access compared to the average among disabled people, levels remain lower than for non-disabled consumers. The smallest difference between internet access levels is among non-disabled and visually impaired people aged under 65 in socio-economic group ABC1 (96% and 89% respectively). However, among C2DEs (regardless of age) and older ABC1s, differences in access levels become more marked (at least 13 percentage points) suggesting that other factors are playing a role in limiting internet access for these people, or that their disability is compounding the age and SEG effects.
- **People with a visual impairment have a higher-than-average propensity to use the internet for social networking and job searching,** reflecting the younger profile of this disability type. Fifty three per cent use the internet for social networking, compared with the 45% disabled average and the 55% non-disabled average. Twenty five per cent use internet job searching (compared with the 16% disabled average and the 22% non-disabled average).
- **Pay TV levels are lower overall in homes with visually-impaired adults.** Forty four per cent of visually impaired adults live in a home with pay TV, compared with 55% of non-disabled adults.

## People with multiple impairments (page 75)

- **Particularly among older consumers with mobility impairments, aspects other than age and socio-economic group appear to be limiting levels of internet access.** People with multiple disabilities are the least likely to have internet access; this is largely a reflection of their older age profile and the higher proportion in socio-economic group DE. However, even among the younger (under-65) ABC1s, internet access is lower than for non-disabled people in this demographic group. The differences are larger among C2DEs across both broad age groups, and among older people with multiple impairments.
- **Internet users with multiple impairments access the internet less frequently than non-disabled people.** But younger people with multiple impairments access the internet more frequently than the average for this group, as do people in larger households.
- **Household mobile ownership is more widespread than fixed-line ownership among people aged 35-64 with multiple impairments**

## Section 3

# Profiles of disability groups

## Introduction

Recent disability statistics from the Office for Disability Issues<sup>5</sup> show that the prevalence of disability increases with age. Fifteen per cent of working-age people are disabled, compared to 45% of adults at state pension age or above. The statistics also show that a substantially higher proportion of individuals living in families with disabled members 'live in poverty' – 20% compared to 15%. While there has been an increase in employment rates among disabled people (the gap has reduced by ten percentage points over 14 years), they remain significantly less likely than non-disabled people to be in employment (46% compared to 76% of working-age people in 2012).

In this section we look at the demographics, and additional profile data by disability type, obtained from the BPS. The total sample of self-reported disabled people generated over this period in the BPS study was 4,095, compared to 17,412 non-disabled people, or 19% of the sample of adults aged 15 and over.

## Key trends

- **People with mobility or multiple impairments have the oldest profiles.** The research confirms the strong correlation between disability and age. Three in ten (28%) disabled people are aged 75+, compared to 6% of non-disabled people. Half (49%) of all people with multiple impairments and a third (32%) of people with a mobility impairment are aged 75 or over.
- **Disabled people are more likely to live alone, particularly those with mobility or multiple impairments.** Forty per cent of people with a disability live alone, compared with 16% of non-disabled people. The figure for people with mobility impairment is 47% and for those with multiple impairments is 44%. This may reflect the older age profile of these groups of people.
- **Households with people with mobility or multiple impairments are more likely than non-disabled households to be C2DE.** Three in five (60%) households with disabled people with multiple impairments are C2DE, compared to 46% among non-disabled households. The proportion of C2DE homes rises to 66% among those with people with mobility impairments. People with visual or hearing impairments have a similar socio-economic group profile to non-disabled people.
- **People with mobility or multiple impairments are also the least likely to be in employment.** About one in ten people with mobility impairment (10%) or multiple impairments (8%) are employed, compared with the disabled average of 17%. Among people aged under 65, those with a mobility impairment (36%) or multiple impairments (42%) are more likely to say they are 'not working due to disability or long term illness' compared with the disabled average (29%).

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<sup>5</sup> <http://odi.dwp.gov.uk/disability-statistics-and-research/disability-facts-and-figures.php>

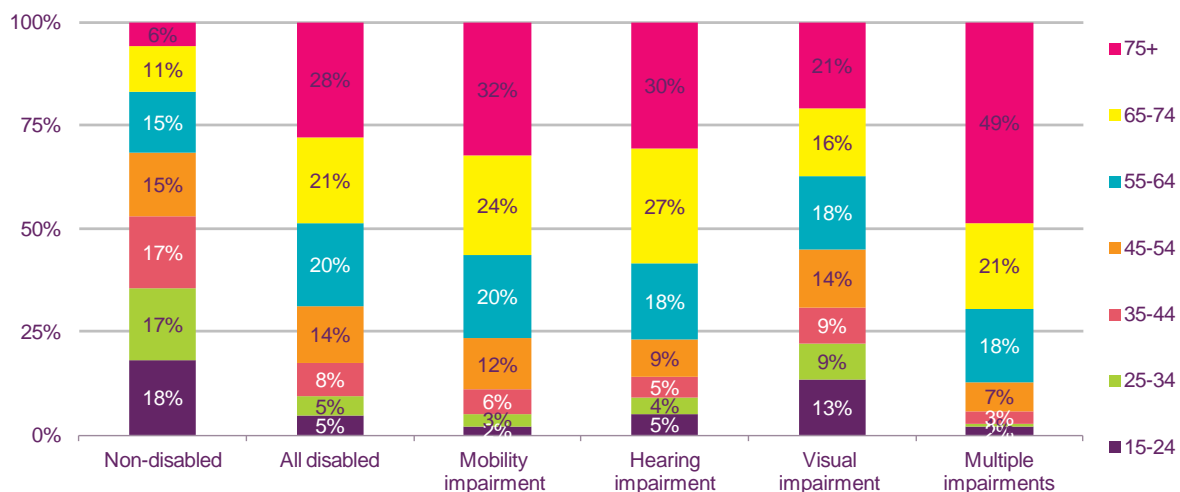
## Demographic profiles

### People with mobility or multiple impairments have the oldest profiles.

Figure 1.0 compares the age profile of non-disabled people with the disabled population; overall, and by disability type. The disabled population has an older age profile, with the age difference being most pronounced among those aged 75+. Twenty-eight per cent of disabled adults are aged 75+, compared to 6% of non-disabled adults.

There are also marked differences between disability types; people with mobility, hearing and multiple impairments have the oldest profiles (49% of people with multiple impairments, 32% with mobility impairment and 30% with a hearing impairment are aged 75+, compared with 6% of non-disabled people). By contrast, those with visual impairments have a younger profile. A fifth (21%) of people with a visual impairment are aged 75+ and a similar proportion (22%) are aged under 34, compared with 10% for the disabled average.

Figure 1.0 Disability type, by age



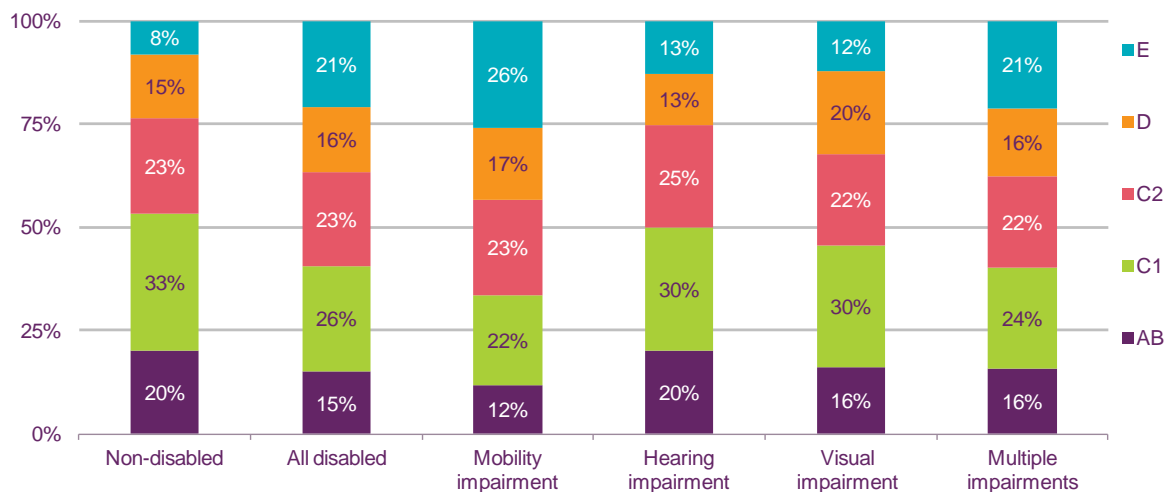
Source: British Population Survey: July – September 2012

Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

### Disabled people with mobility or multiple impairments are the most likely to be C2DE.

Three in five (60%) households with disabled people with multiple impairments are C2DE, compared with 46% among non-disabled households. The proportion of C2DE homes rises to 66% among households with people with mobility impairments. People with visual or hearing impairments have a similar socio-economic group profile to non-disabled people.

Figure 1.1 Disability type, by socio-economic group.



Source: British Population Survey, 2012: July – September 2012

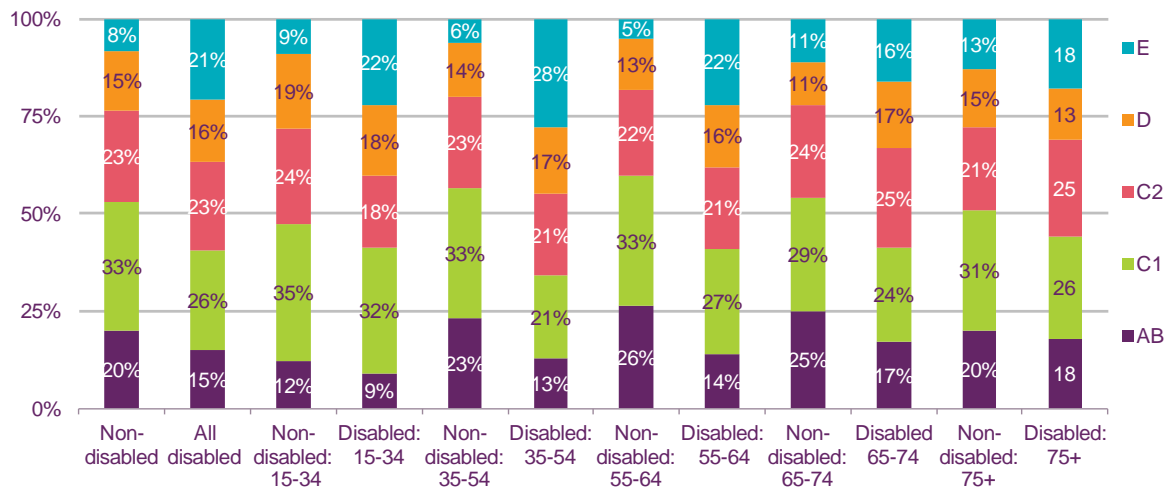
Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

**Disabled people are more likely than non-disabled to fall into socio-economic group E, across all except the oldest age groups.**

Socio-economic group differences between disabled and non-disabled adults is most pronounced with respect to group E. A fifth (21%) of people with a self-reported disability are classified as E, compared with less than one in ten (8%) non-disabled people. This socio-economic group includes casual and lowest-paid workers, pensioners and others who depend on benefits for their income.

The chart below compares the socio-economic profile of disabled people with non-disabled people, by age band. This reveals that across each of the younger age groups, i.e. up to age 65, people with impairments and/or disabilities are significantly more likely to be in socio-economic group E than are non-disabled consumers in the same age group. From age 65 the proportions are broadly comparable between disabled and non-disabled people.

Figure 1.2 Disabled and non-disabled comparison, by SEG within age



Source: British Population Survey, 2012: July – September 2012

Base: non-disabled: 17,412, all disabled: 4,095, non-disabled 15-34: 6178, disabled 15-34: 384, non-disabled 35-54: 5674, disabled 35-54: 899, non-disabled 55-64: 2544, disabled 55-64: 818, non-disabled 65-74: 1978, disabled 65-74: 842, non-disabled 75+: 1006, disabled 75+: 1138

**People with mobility impairments or multiple disabilities are the least likely to be employed.**

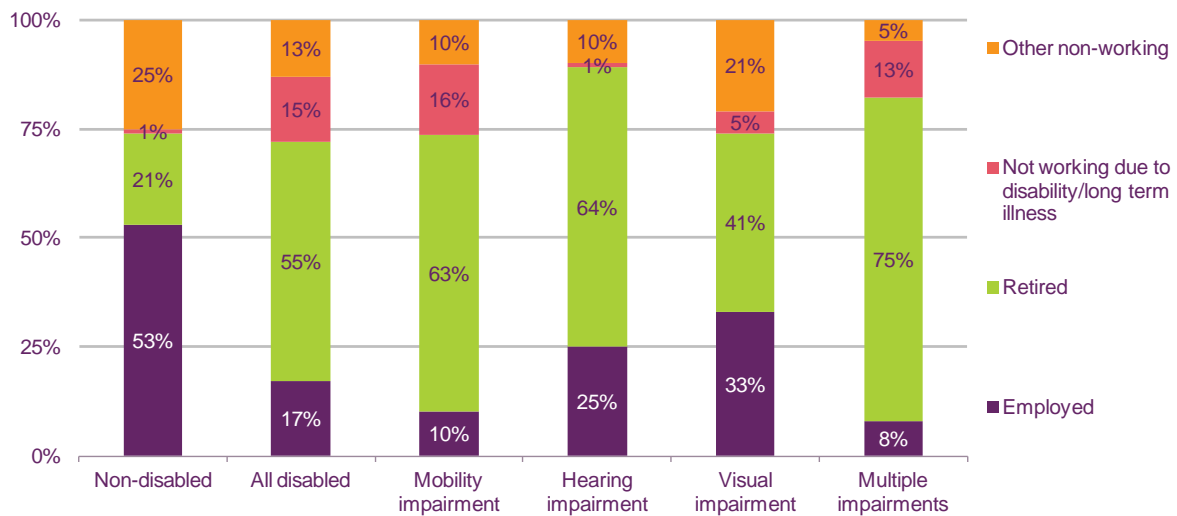
Not surprisingly, given the age profile, more disabled than non-disabled people are retired (55% compared to 21%) and 17% are employed, compared to more than half (53%) of non-disabled people. Fifteen per cent report their employment status as ‘not working due to disability or long term illness’.

Reflecting their older age profiles, those with multiple disabilities, and to a lesser extent those with hearing and mobility impairments, are most likely to be retired (75%, 64% and 63% respectively).

Those with visual and hearing impairments are more likely than the disabled average to be employed (33% and 26% respectively). Conversely, around one in ten people with mobility impairment (10%) and people with multiple disabilities (8%) say they are employed.



**Figure 1.3 Disability type, by employment status**



Source: British Population Survey, 2012: July – September 2012

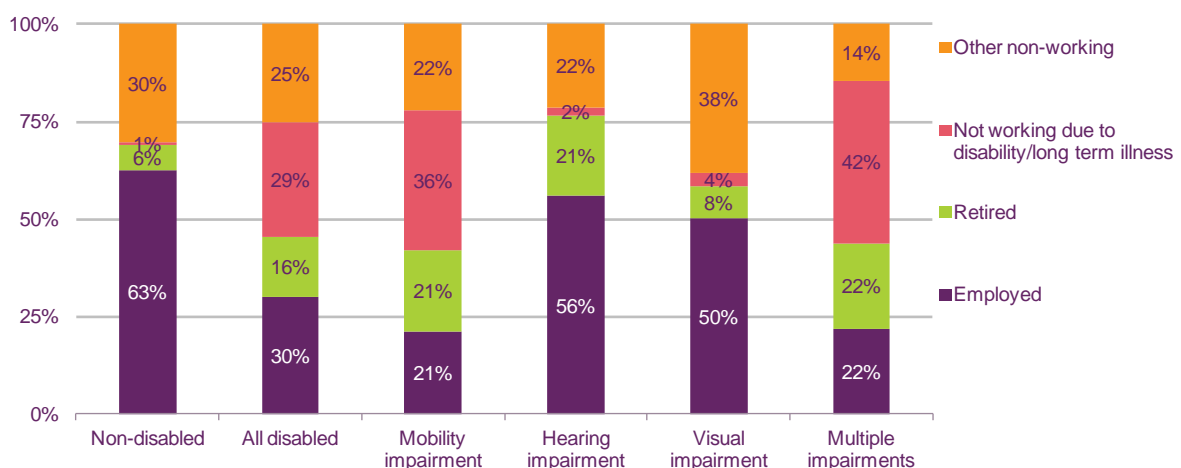
Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

Given the differing age profiles across the disabled groups, the data on working status have been analysed only among people aged under 65, to reduce the age effect.

People with mobility impairments (21%) or multiple impairments (22%) aged under 65 are much less likely to be working than those with self-reported hearing (55%) or visual impairments (50%).

Conversely, 36% of people with mobility impairments, and 42% of people aged under 65 with multiple impairments state their employment status as 'long term illness or disability', compared with 2% of people with a hearing impairment and 4% of people under 65 with a visual impairment.

**Figure 1.4 Disability type of people aged under 65, by employment status**



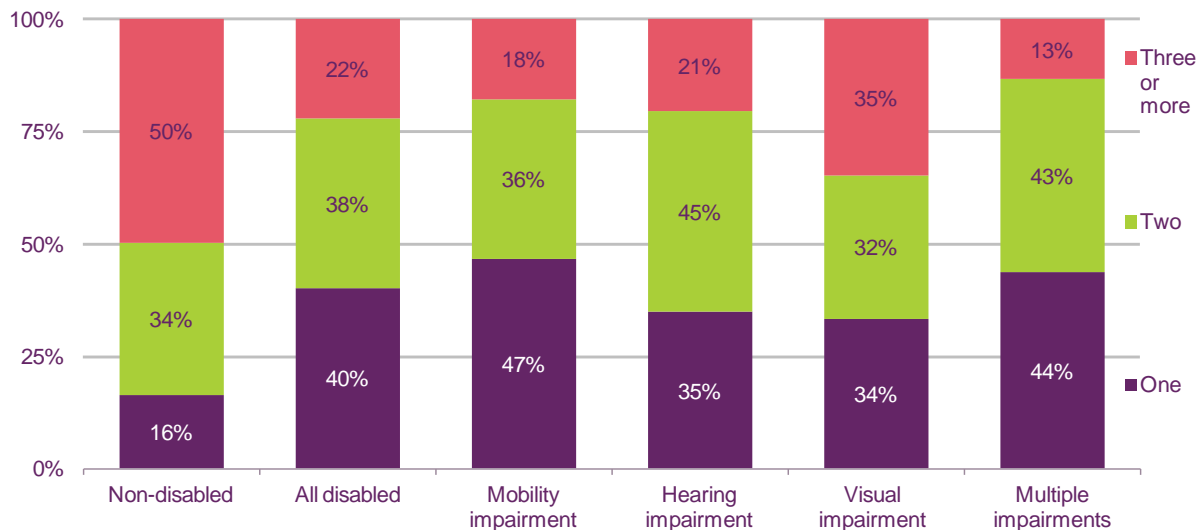
Source: British Population Survey, 2012

Base: non-disabled: 14396, all disabled: 2,101, mobility impairment: 495, hearing impairment: 204, visual impairment: 231, multiple impairments: 440

## Disabled people are more likely to live alone, particularly those with mobility or multiple impairments.

Disabled people are more likely than non-disabled people to live in single-person households. Forty per cent of people with a disability say they live alone, compared with 16% of non-disabled people. The chart below shows that, of the disability types, those with mobility impairments (47%) and multiple disabilities (44%) are the most likely to live in single-person households, which may reflect the older age profile of these disability groups.

Figure 1.5 Household size, by disability type

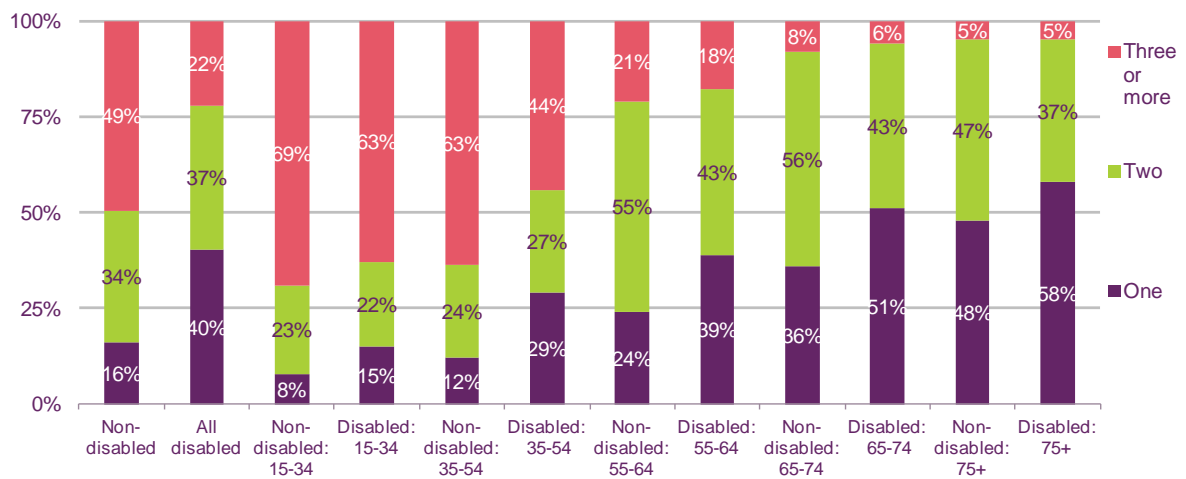


Source: British Population Survey, 2012: July – September 2012

Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

The chart below looks at household size within age, and shows that people with a disability are more likely to live alone, at all ages, than non-disabled people, particularly from age 35+. Twenty-nine per cent of people aged 35-54 with a disability live alone, compared with 12% of people with no disability. The gap narrows for people aged 75 and over, with more non-disabled people living alone.

Figure 1.6 Disabled and non-disabled comparison, by household size within age



Source: British Population Survey, 2012: July – September 2012

Base: non-disabled: 17,412, all disabled: 4,095, non-disabled 15-34: 6178, disabled 15-34: 384, non-disabled 35-54: 5674, disabled 35-54: 899, non-disabled 55-64: 2544, disabled 55-64: 818, non-disabled 65-74: 1978, disabled 65-74: 842, non-disabled 75+: 1006, disabled 75+: 1138

## Section 4

# Take-up of services and devices: overview

## Introduction

The *Consumer Experience of 2012* research<sup>6</sup> report published an overview of the take-up of services and devices among disability groups. This section builds on these findings, including more detail on people with mobility impairments, and also includes analysis of people with multiple impairments. It provides an overview of device and service take-up at an overall level by disability, and the overall impact of age, SEG, employment status and household size.

## Key trends

### Overview

- **Ownership of communications services is generally lower among people with a disability than among those without, particularly for internet access.** The exception to this is fixed-line telephony, which among people with a disability is equal to or higher than the non-disabled average. The biggest gap in ownership of communications services, between people with and without a disability is for internet access (55% and 83% respectively).
- **There are indications that disability may be limiting ownership and access to communications services.** Demographic differences explain many of the differences in ownership and access levels among disabled consumers compared to non-disabled. But there are variations of service ownership within common demographic groups which suggest that aspects other than age and socio-economic group are limiting ownership, or at least compounding the effects of these demographics. There are variations across different groups of disabled consumers and variations by service/device, which are explored in more detail below.
- **Ownership of communications services and devices is highest among disabled people with hearing or visual impairments.** People with hearing or visual impairments report comparable or higher levels of ownership of most services/devices to the average for disabled consumers. For hearing-impaired people, average ownership levels are driven up by the higher proportion in socio-economic groups ABC1, and for people with visual impairments higher ownership is linked to their younger profile and larger household size.
- **Disabled people in employment are as likely as employed non-disabled people to own, or have access to, most communications services.** Disabled people in employment have higher-than-average ownership of all services, compared to the average for disabled people. For example, mobile ownership stands at 91% among employed disabled people and smartphone ownership at 58%; this compares to 81% and 27% average among all disabled consumers. Similarly, internet access among

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<sup>6</sup> Ofcom *Consumer Experience of 2012* (pp70-74): <http://stakeholders.ofcom.org.uk/market-data-research/market-data/consumer-experience-reports/consumer-experience/>

disabled people in employment is higher, at 87% compared to 55% among the total sample of disabled people and 83% among non-disabled consumers.

## Internet

- **Factors other than age and SEG limit internet access for all except young ABC1 disabled people.** Age and income clearly affect levels of internet access among disabled people, as they do for non-disabled people, but other factors, perhaps related to the disability, are further limiting access for some. The greatest differences are noted among C2DEs, and some of this may be explained by the higher proportion in socio-economic group E. There are variations by type of disability.
- **Lower internet access among people with hearing impairment can largely be explained by their differing demographic profile.** The impact of factors other than age and SEG vary by disability group, with these less evident among people with hearing impairment. This suggests that on the whole the lower ownership at an aggregate level among people with hearing impairment can be explained for by their differing demographic profile.
- **For people with mobility and multiple impairments levels of internet access remain significantly lower than among non-disabled people** even when comparing the same combined age and socio-economic groups. This suggests for these consumers other factors are coming into play or at least compounding the effects of age and income.
- **Home PC ownership is lower among disabled than non-disabled people.** Around three in five (59%) disabled people live in a house with a PC, compared with just under four in five (79%) non-disabled people. PC incidence levels are higher among younger adults and decrease with age, regardless of disability.
- **Internet access is broadly similar for 15-34 year olds, regardless of whether or not they have a disability.** Ninety per cent of disabled people under 35 have internet access, compared with 93% of non-disabled adults. From the age of 35 differences in access levels develop, with the exception of people with hearing impairment. Internet access among this group is comparable to non-disabled adults regardless of age.
- **Disabled people are less likely to access the internet outside the home or via mobile devices, and tend to be lighter users.** Almost all internet users said they access the internet at home. Disabled people are less likely to access it in other locations (19%) or via a mobile device (23%) than are non-disabled people (36% and 35% respectively). Most disabled and non-disabled internet users say they use the internet daily or more often, although the incidence of this is lower among disabled people, at 73% and 85% respectively. Internet users with visual impairment access the internet most frequently: 81% claim to do so at least once a day.

## Telecoms

- **Fixed-line ownership is higher among people with a disability; this is driven by the older age profile and higher ownership among people aged 55+.** Nearly four in five (79%) people with a disability have access to a landline at home, compared with 74% of people without a disability. However, fixed-line ownership is generally lower among people aged 15-54 with a disability compared to ownership among this

age group without a disability. Household ownership is higher among those aged 55+ for all disability groups.

- **Mobile home access levels are higher among disabled people aged 15-34 (92%) than among non-disabled adults in the same age group (87%).** However, Smartphone ownership is lower among people with a disability than those without: 27% compared with 48%. However, age plays a large role. Ownership among younger disabled people (68%) is higher than among non-disabled people in this age group (62%). Between the ages of 35-64 smartphone ownership among disabled people drops below that of non-disabled people. There are also differences by impairment type; people aged 35-64 with a hearing impairment (66% among those aged 35-54 and 40% among those aged 55-64) are more likely than other disabled people, and also than non-disabled people (57% and 35% respectively), to have a smartphone at home.
- **Factors other than age and SEG may be limiting mobile ownership, but to a lesser extent than for the internet.** The gaps in smartphone home ownership levels between disabled and non-disabled consumers within each age band by SEG are relatively small compared to the total market. These range from one to eight percentage points lower among disabled consumers.

## Overview

### **Among disabled people, ownership of communications services/devices is highest among those with hearing or visual impairments.**

As reported in the *Consumer Experience of 2012* report, with the exception of fixed-line telephony and Freeview/Freesat television, access to communications services is generally lower among those with disability than among those with no disability. The biggest gap in ownership between people with and without a disability is for internet access.

There are differences by disability type. People with a hearing or visual impairment report comparable or higher levels of ownership of most services/devices than the average for disabled consumers. While ownership tends to be lower than the disabled average for those with mobility or multiple disabilities, the overall levels are broadly similar between these two groups.

Further analysis by disability type can be found in sections 5-8.

Figure 1.7 Household device/services: ownership overview

	Non-disabled	All disabled	Mobility impairment	Hearing impairment	Visual impairment	Multiple impairments
Fixed Line	74%	79%	81%	84%	72%	83%
Any mobile	87%	81%	80%	82%	80%	75%
Smartphone	48%	27%	21%	28%	33%	17%
PC	79%	59%	52%	63%	65%	51%
Internet access*	83%	55%	47%	64%	62%	41%
Tablet	17%	10%	9%	10%	11%	5%
Pay TV	55%	46%	43%	48%	44%	43%
Freeview/Sat	53%	64%	64%	63%	62%	66%
DAB	26%	21%	17%	27%	20%	19%

Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.

## Impact of demographics

### Mobile ownership is broadly comparable for under 65s whereas PC and internet access is lower among disabled consumers, irrespective of age.

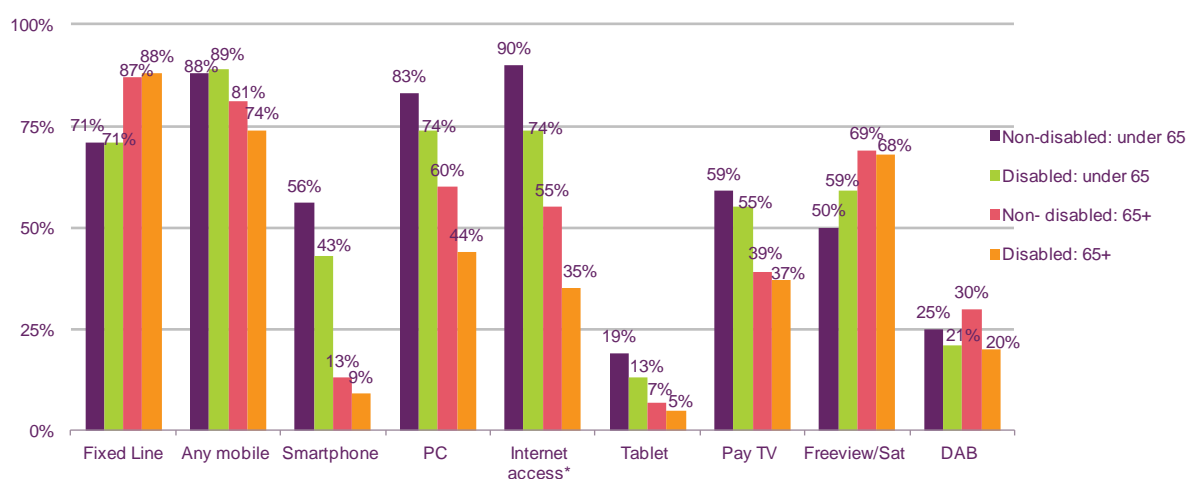
Among the total disabled population, as is the case among non-disabled people, the general pattern is for higher levels of ownership of communications services among younger people and lower levels among older people, as shown below. The exceptions are for fixed lines and Freeview/Freesat, which report higher levels of ownership among older people, again consistent with the broad trend in ownership.

Mobile ownership (i.e. at least one mobile in the household) is broadly comparable between disabled and non-disabled people aged under 65, but at 65+ disabled people are less likely to own a mobile than their non-disabled counterparts. Smartphone ownership is, however, lower among disabled people across both broad age ranges.

Similarly, home PC ownership and levels of internet access are both lower among disabled people, irrespective of age group.

Further age breaks within each sector are reported below, and the impact of age by type of disability is explored in sections 5-8.

**Figure 1.8 Household device/service ownership: over-65s compared to under-65s**



Source: British Population Survey, 2012: July - September 2012

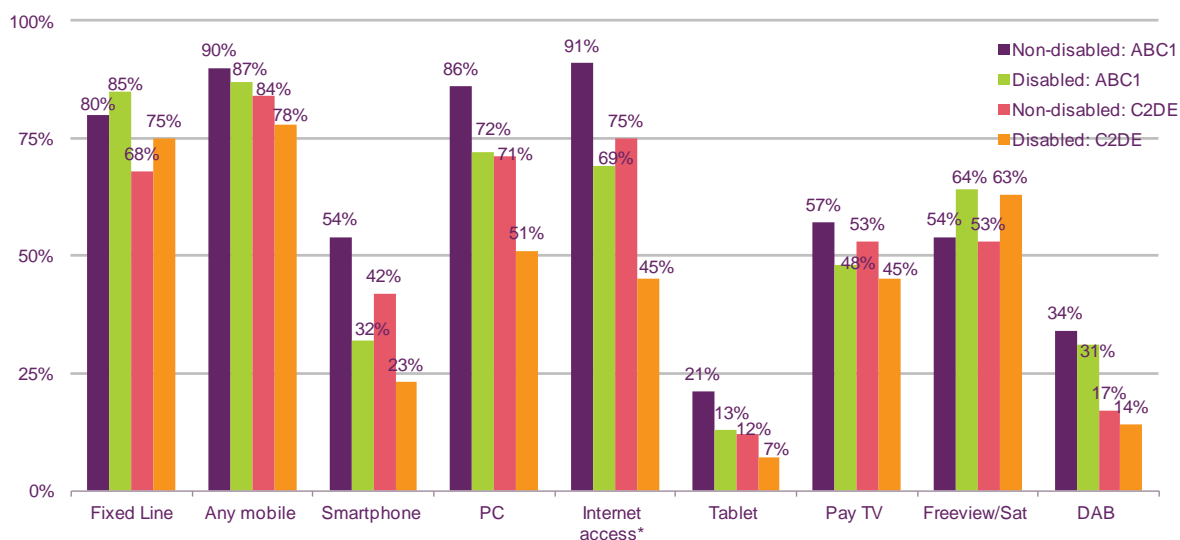
Base: non-disabled under 65: 14,396, disabled under 65: 2,101, non-disabled 65+: 3,016, disabled 65+: 1,994

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.

**Disabled C2DE adults report lower home ownership of mobile phones, PCs, DAB radios and internet access.**

Ownership of most services is higher among ABC1 adults than C2DE adults for both non-disabled and disabled people. However, even among ABC1s, home ownership of PCs and smartphones, and internet access levels, are lower for disabled people.

**Figure 1.9 Household device/service ownership: impact of socio-economic group**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled ABC1: 9257, disabled ABC1: 1665 non-disabled C2DE: 8155, disabled C2DE: 2430

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.



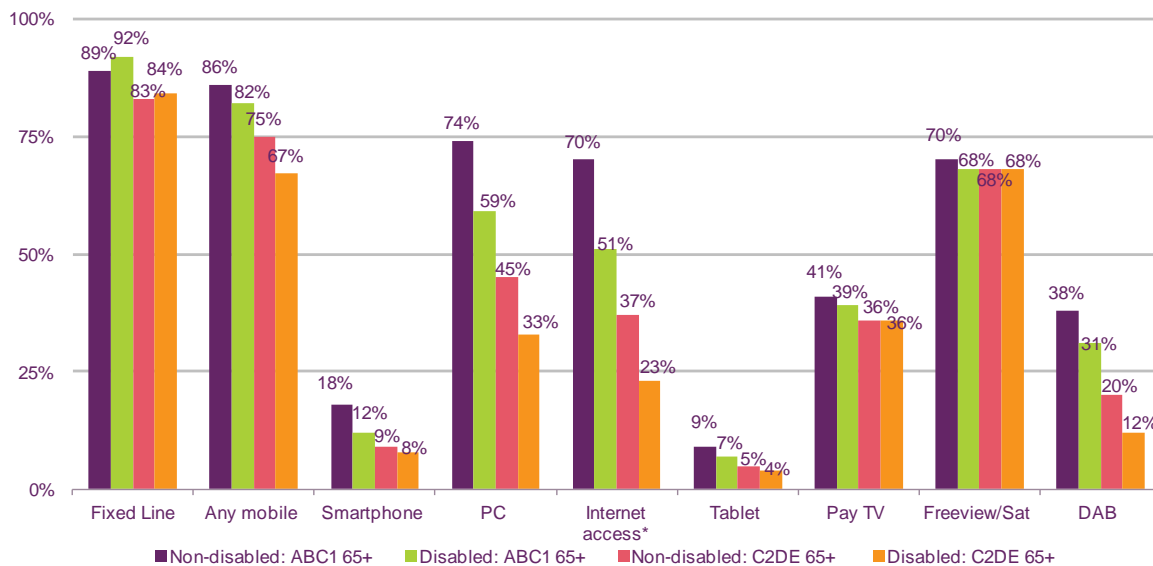
## Disability may be limiting or compounding demographic affect on ownership of services and devices for some over-65s.

In order to understand more about what is driving the lower ownership of services among older consumers across socio-economic groups, the following analysis combines these demographics. This allows us to understand the extent to which factors other than age and income might be limiting take-up of core services.

The data suggest that ownership of many communications services is lower among disabled consumers aged 65+ in each broad socio-economic group, compared to their non-disabled counterparts. This suggests that disability, or other factors, may be limiting ownership for some consumers.

For example, PC ownership and internet access stands at 74% and 70% respectively among non-disabled adults aged 65+ in socio-economic group ABC1, whereas the comparable figures among people with a disability are 59% and 51%.

**Figure 1.10 Household device/service ownership: the combined effect of age (65+) and socio-economic group**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled ABC1 65+: 1,607, disabled ABC1 65+: 861, non-disabled C2DE 65+: 1,409, disabled C2DE 65+: 1,133

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.

## People in employment are more likely to own or have access to most communications services and devices, regardless of disability.

While, overall, household ownership of services is generally lower for disabled than for non-disabled people, disabled consumers in employment have the highest levels of ownership of most services, compared with other disabled people. This may be due to a combination of age and economic circumstances. For example, mobile ownership stands at 91% among employed disabled people and smartphone ownership at 58%; this compares to 81% and 27% average among all disabled consumers and 87% and 48% among non-disabled people.

Similarly, internet access among disabled people in employment is higher than the average for disabled consumers, at 87% compared to 55% among the total sample of disabled people and 83% among non-disabled consumers.

Figure 1.11 Household device/service ownership: impact of employment status

	Non-disabled	All disabled	Employed - disabled	Not working due to disability/long term illness - disabled	Retired - disabled	Other not working - disabled
Fixed Line	74%	79%	77%	64%	87%	68%
Any mobile	87%	81%	91%	86%	75%	90%
Smartphone	48%	27%	58%	31%	11%	46%
PC	79%	59%	86%	61%	47%	73%
Internet access*	83%	55%	87%	61%	39%	74%
Tablet	17%	10%	18%	8%	6%	14%
Pay TV	55%	46%	62%	49%	39%	53%
Freeview/Sat	53%	64%	59%	61%	67%	57%
DAB	26%	21%	28%	14%	21%	17%

Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, all disabled: 4095, employed - disabled: 678, not working due to disability/long term illness – disabled: 627, retired – disabled: 2241, other not working – disabled: 549

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual.

### Device and service ownership is lowest in single-person households.

As noted above, most of the questions in the survey are based on household rather than individual ownership of services and devices (with the exception of internet access which is 'personal access'). The following section explores differences by household size. This can isolate disabled-only households, i.e. single-person disabled households. It may be that some multiple-person households are also 'disabled-only' but we are unable to establish this from the current data.

Ownership of communications services tends to be higher in larger households and lowest in single-person households. This correlates with age and life stage, in that single-person households tend to be older and lower SEG. Multiple households are younger and may be subject to the positive impact of children as influencers of take-up.

**Figure 1.12 Household device/service ownership overview: impact of household size**

	Non-disabled	All disabled	One	Two	Three or more
Fixed Line	74%	79%	75%	84%	79%
Any mobile	87%	81%	72%	86%	90%
Smartphone	48%	27%	13%	24%	56%
PC	79%	59%	38%	67%	86%
Internet access*	83%	55%	38%	59%	79%
Tablet	17%	10%	4%	9%	20%
Pay TV	55%	46%	32%	49%	68%
Freeview/Sat	53%	64%	68%	66%	52%
DAB	26%	21%	15%	27%	22%

Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, all disabled: 4,095, disabled in one person household: 1,648, disabled in two person household 1,533, disabled in three or more person household: 908

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.

## Focus on internet

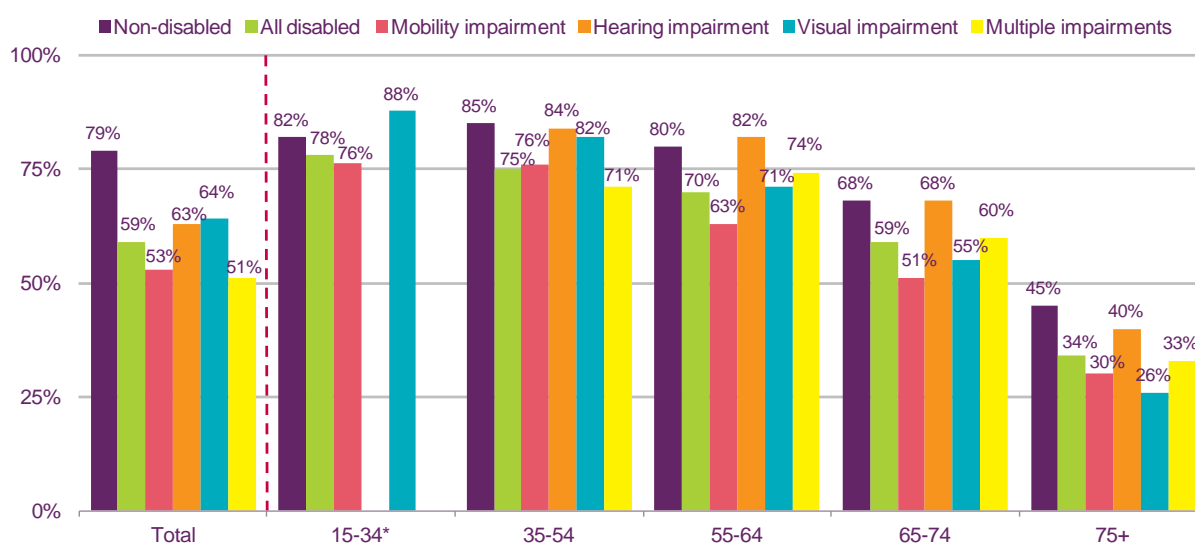
### PC ownership varies within age group by type of disability; people with hearing impairment are most likely to have a PC at home across all age bands.

The following section explores household ownership of PCs, whether people have access to the internet and if so, how much they use it. Internet access is based on access anywhere (i.e. both inside and out of the home including use via mobile devices).

As noted above, home PC ownership is lower for disabled than for non-disabled people. Just under six in ten (59%) disabled people live in a house with a PC, compared with just under eight in ten (79%) non-disabled people. Ownership follows the general pattern of non-disabled adults; i.e. higher among younger adults, decreasing with age. The gap in ownership between disabled and non-disabled adults is less marked among the younger age groups; 78% of disabled adults aged 15-34 have home internet access compared with 82% of non-disabled people in this age group: this compares to a ten-point difference among those aged 35+.

Younger people with visual impairments are more likely than other disability types to have a PC at home (88%) but after the age of 35 it is people with a hearing impairment who are most likely to have a PC at home.

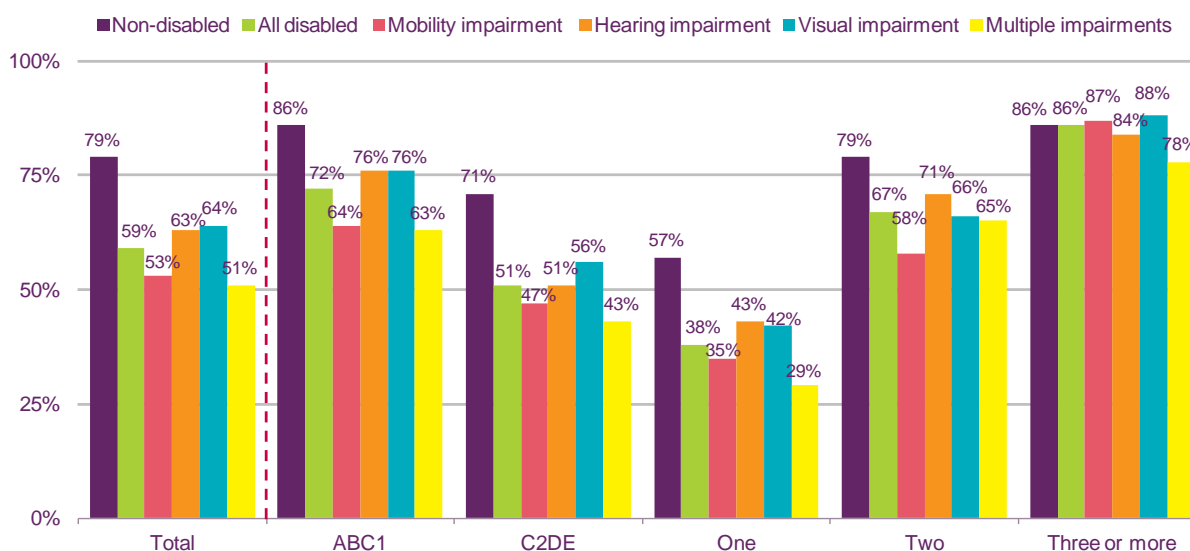
**Figure 1.13 Household PC ownership, by disability type and age**



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636  
 \*Information for 15-34 year olds has not been included in the hearing and multiple columns due to base sizes being under 50.

As noted before, socio-economic group and living alone (the latter influenced by the older age profile) have an impact on service and device ownership. The difference in home PC ownership between non-disabled and disabled people is most marked for C2DE and single-person households, with around a 20 percentage point difference in take-up.

**Figure 1.14 Household PC ownership, by disability type, SEG and household size**

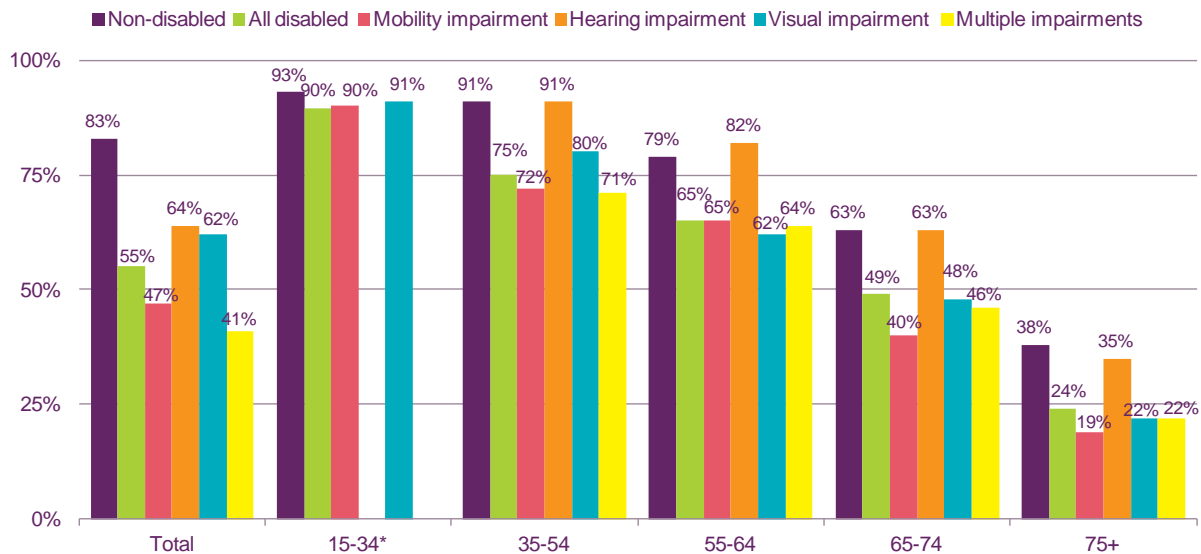


Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

## Internet access among 15-34 year olds is broadly comparable regardless of whether or not they have a disability.

Turning to levels of personal internet access, for people aged between 15 and 34 there is little difference between disabled and non-disabled people: 90% of disabled people under 34 have internet access compared with 93% of non-disabled adults. From the age of 35 lower access levels are noted among the various disability groups. The exception is people with hearing impairments, among whom internet access is comparable to non-disabled adults, regardless of age.

Figure 1.15 Personal internet access, by disability type and age



Source British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, all disabled: 4095, mobility impairment: 1134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

\*Information for 15-34 year olds in the hearing and multiple columns not included due to base sizes being under 50.

## Factors other than age and socio-economic group appear to be limiting internet access among disabled people, with the exception of young ABC1s.

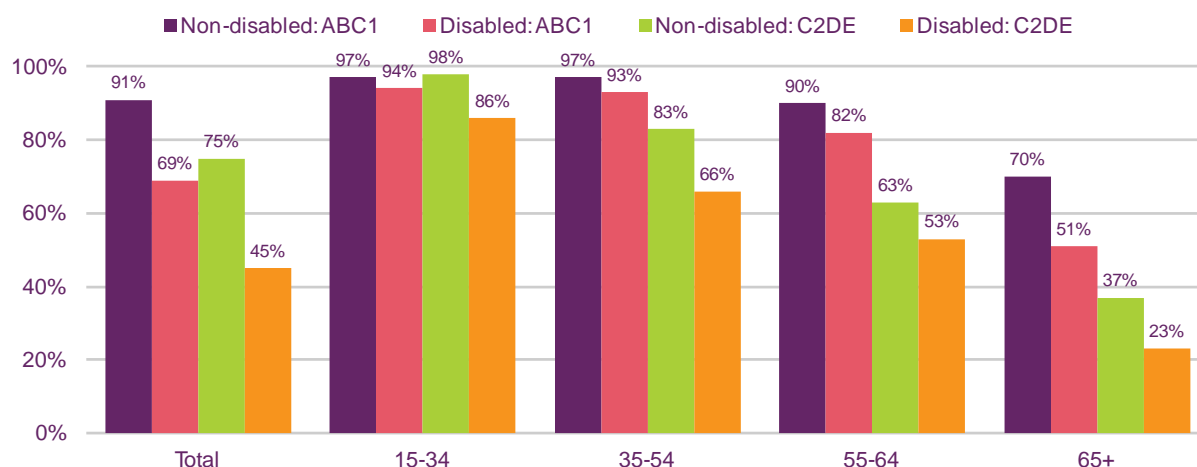
To better understand the possible incremental impact that disabilities may have on ownership, the following chart compares ownership within age and broad socio-economic groups. It compares disabled and non-disabled people within each of these combined demographic groups.

Internet access is lower among older (55+) disabled people compared to older non-disabled people, regardless of socio-economic group. For example, internet access among disabled people aged 55-64 stands at 82% for ABC1s and 53% for C2DEs. This compares to 90% and 63% respectively among non-disabled people in the same demographic.

Lower levels of internet access are also noted among C2DEs, regardless of age. Some of these differences may be driven by a higher proportion of disabled people in socio-economic group E, where internet access is at its lowest.

This analysis suggests that while age and income clearly affect levels of internet access among disabled people, as they do for non-disabled people, other factors, perhaps related to the disability, are further limiting access for disabled people.

**Figure 1.16 Personal internet access, by age combined with socio-economic group**



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled ABC1: 9257, disabled ABC1: 1665, non-disabled C2DE: 8155, disabled C2DE: 2430

The impact of factors other than age and SEG vary by disability group, with other factors less evident among people with hearing impairments. This suggests that, on the whole, the lower ownership at an aggregate level among people with hearing impairments can be accounted for by their demographic profile. For other disability groups, however, such as people with mobility and multiple impairments, levels (for internet access in particular) remain significantly lower than among non-disabled people, even when comparing the same combined age and socio-economic groups. This suggests that for these consumers other factors are coming into play, or are at least compounding the effects of age and income in relation to internet access.

**Figure 1.17 Personal internet access, by age combined with socio-economic group, and by type of disability**

Internet access by age within socio-economic group		Non-disabled	Mobility impairment	Hearing impairment	Visual impairment	Multiple impairments
Total		83%	47%	64%	62%	41%
Aged under 65	ABC1	96%	89%	95%	89%	83%
	C2DE	83%	63%	78%	70%	61%
Aged 65+	ABC1	70%	43%	64%	47%	43%
	C2DE	37%	19%	33%	24%	18%

Source: British Population Survey, 2012: July - September 2012  
 Base: all with internet access: non-disabled: 14,539, mobility impairment: 529, hearing impairment: 322, visual impairment: 228, multiple impairments: 262

Further analysis of this type is included in Sections 5-8.

## Disabled people are less likely to access the internet outside the home and to use mobile devices for accessing the internet.

The survey asked people how long they had had access to the internet and how frequently they tended to access it.

Almost all internet users said they accessed the internet at home. Disabled people are less likely than non-disabled people to access it in other locations (19% vs. 36%) or via a mobile device (23% vs. 35%). It is likely that use outside the home is correlated to employment status and/or age - this being higher among disability groups with the highest employment levels (i.e. with visual or hearing impairments) and lower among groups with higher levels of retirement (i.e. with mobility impairment).

Figure 1.18 Internet use, by type of disability

		Non-disabled	All disabled	Mobility impairment	Hearing impairment	Visual impairment	Multiple impairments
Where internet is accessed	Home	96%	96%	96%	97%	95%	99%
	Other Location	36%	19%	13%	22%	30%	17%
	Mobile	35%	23%	17%	21%	29%	18%
Length of time of internet access	0-3 years	10%	15%	16%	10%	13%	17%
	3-6 years	16%	18%	19%	19%	21%	16%
	6+ years	73%	68%	65%	71%	64%	66%
Frequency of internet usage	More than daily	66%	52%	48%	47%	66%	44%
	Daily	19%	21%	22%	27%	15%	18%
	Less often	16%	27%	30%	26%	18%	38%

Source: British Population Survey, 2012: July - September 2012

Base: all with internet access: non-disabled: 14,539, all disabled: 2,252, mobility impairment: 529, hearing impairment: 322, visual impairment: 228, multiple impairments: 262

## Disabled internet users tend to be less frequent users and to have come online more recently than non-disabled people.

Among those with internet access, most disabled and non-disabled users have been online for more than six years: 73% and 68% respectively. However, disabled users are more likely to have come online within the last six years. One in three disabled users has been accessing the internet within for less than six years, compared with 26% of non-disabled users.

Most disabled and non-disabled internet users say they use the internet daily or more often, although this is lower among disabled people, at 73% compared to 85% among non-disabled. Internet users with a solus visual impairment are accessing it most frequently: 81% claim to access the internet at least once a day, compared with the disabled average of 73% and the average for non-disabled people of 85%. Internet users with multiple disabilities are the least frequent users – just 62% say they use it at least once a day.

## Narrower use of internet among disabled people as a whole.

Top uses of the internet for disabled and non-disabled users are (in order): email, information, shopping, banking, social networking and audio-visual entertainment. However, there is a lower incidence of disabled people using the internet for most of these activities.

While overall shopping and banking are higher among non-disabled users, grocery shopping levels are the same: 18% of non-disabled adults with internet access shop online for groceries, as do 19% of disabled adults. Gaming is similar among disabled and non-disabled groups (16% vs. 18%). This is consistent with the findings of the *Media Literacy Survey* which reports narrower internet use among disabled people than among non-disabled users.<sup>7</sup>

People with a hearing impairment have a higher incidence of email use than the other disability groups. Those with a visual impairment have a higher incidence of using the internet for job search and social networking than the disabled average, reflecting the younger profile of this disability type. Younger disabled people have a higher incidence of internet activities overall.

Figure 1.19 Internet activities, by type of disability

		Non-disabled	All disabled	Mobility impairment	Hearing impairment	Visual impairment	Multiple impairments
Type of internet usage	Email	92%	86%	84%	92%	86%	84%
	Information	89%	85%	84%	85%	83%	82%
	Shopping	66%	61%	59%	63%	60%	59%
	Social networking	55%	45%	44%	36%	53%	40%
	Banking	53%	45%	41%	46%	49%	43%
	AV Entertainment	39%	31%	25%	30%	33%	25%
	Job search	22%	16%	12%	14%	25%	8%
	Gaming/gambling	18%	16%	15%	12%	18%	13%

Source: British Population Survey, 2012: July - September 2012

Base: all with internet access; non-disabled: 14,539, all disabled: 2,252, mobility impairment: 529, hearing impairment: 322, visual impairment: 228, multiple impairments: 262

## Focus on telecoms

### Fixed-line ownership is higher among people with a disability; this is driven by their older age profile.

Fixed-line ownership is higher among people with a disability overall than those without. Nearly four in five (79%) people with a disability have access to a fixed line at home, compared to 74% of people without a disability. However, there are differences by age group. Fixed-line ownership is generally lower among people aged 15-54 with a disability

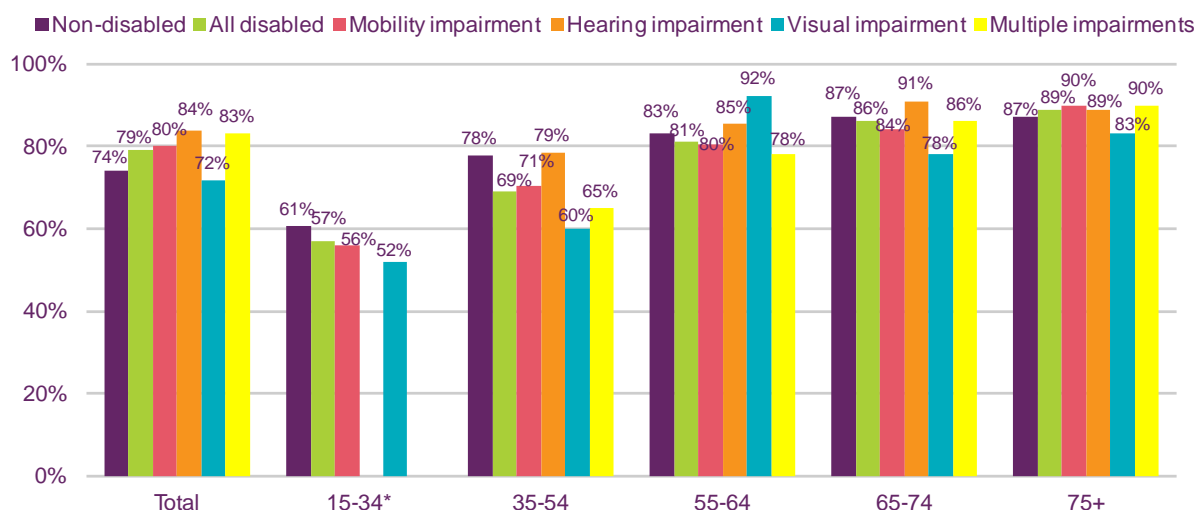
<sup>7</sup> Ofcom *Media Literacy Report* 2012: <http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/adult-media-lit-13/tracker-2012-subset.pdf>. (31% are narrow users, i.e. using the internet for six or fewer activities compared with 16% of non-disabled people)



than among people without a disability in this age band. Access is higher for people aged over 55, for all disability groups.

People with a visual impairment are less likely than people with other single or multiple disabilities to have a fixed line at home: 72% compared with 79% of all disabled people. Access to a fixed line is highest for people with a hearing impairment or multiple disabilities: 84% and 83% overall.

**Figure 1.20 Household fixed-line ownership, by disability type and age**



Source: British Population Survey, 2012: July - September 2012

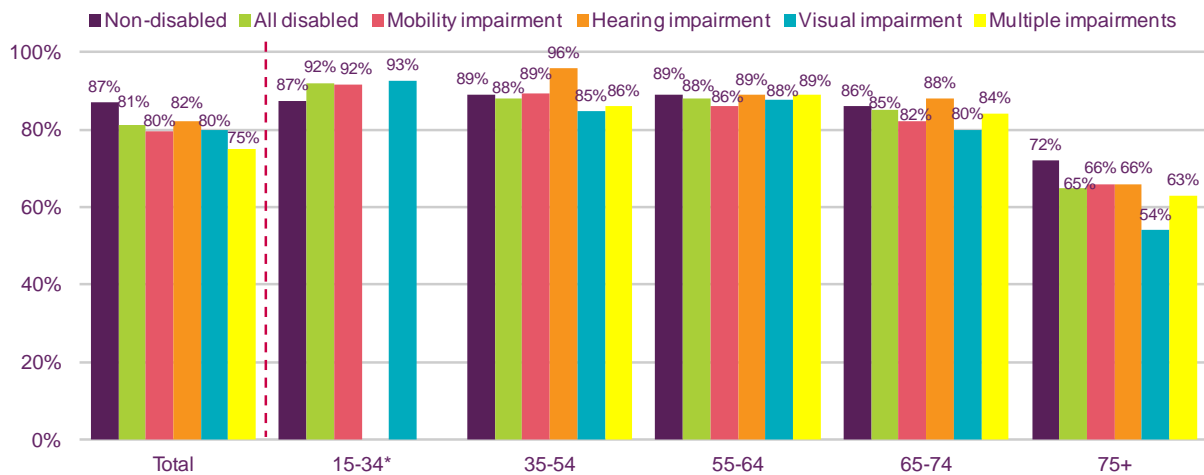
Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

\*Information for 15-34 year olds in the hearing and multiple columns not included due to base sizes being under 50.

**Mobile ownership is broadly comparable between disabled and non-disabled people until age 75, after which ownership is lower among disabled people.**

Eighty-one per cent of people with a disability have a mobile phone in the household, compared with 87% of all non-disabled adults. It is only among people aged over 75 that differences between the disability groups emerge; there are some variations by type of disability. People with a visual impairment aged 75 and over are the least likely to have a mobile phone: 54% compared with 65% of all disabled and 72% of non-disabled adults.

Figure 1.21 Household mobile ownership, by disability type and age



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636  
 \*Information for 15-34 year olds in the hearing and multiple columns not included due to base sizes being under 50.

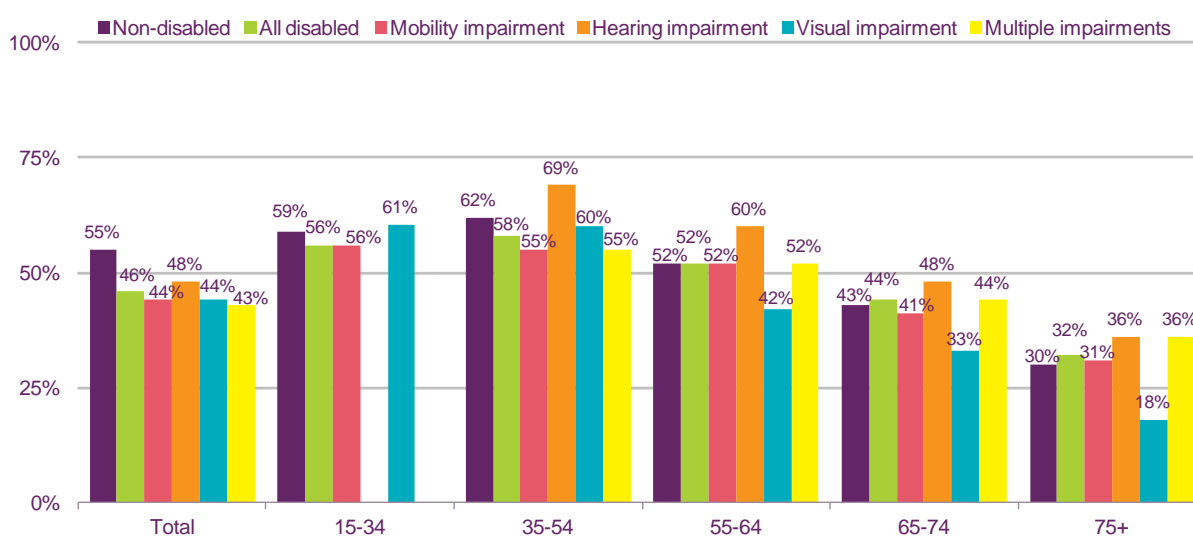
People with a disability in socio-economic groups C2DE are less likely than ABC1s to have a mobile phone (the same trend can be seen for non-disabled people) and people with a visual disability or multiple disabilities who are C2DE are least likely to have one.

## Focus on broadcast

### Lower ownership of pay TV among people with a disability, regardless of socio-economic group.

Disabled people are less likely to have pay TV (46% compared to 55%), whether satellite or cable. Pay-TV ownership is highest among people under 65, and people with hearing impairments are more likely than other groups to have pay TV.

Figure 1.22 Household pay-TV ownership, by disability type and age



Source: British Population Survey, 2012: July - September 2012

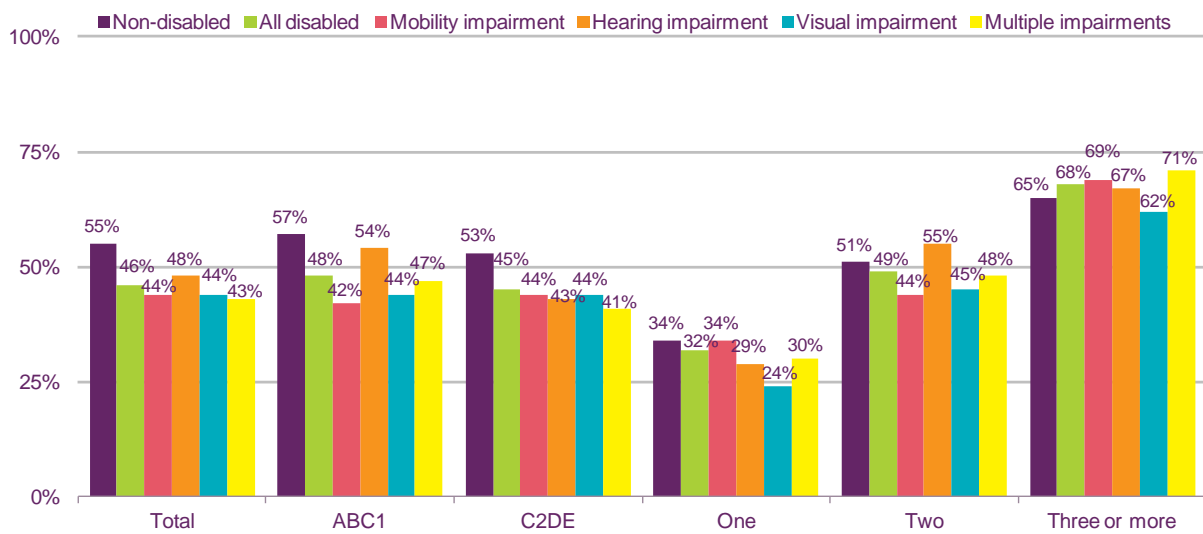
Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

\*Information for 15-34 year olds in the hearing and multiple columns not included due to base sizes being under 50.

While household size tends to play a large factor in pay-TV ownership (higher among larger households) the differences between disabled and non-disabled consumers are small. Within single-person households, which we know are 'disabled-only households', pay-TV ownership is broadly comparable to that among non-disabled single-person households (32% vs. 34% respectively).

Differences between disabled and non-disabled consumers are greater when comparing socio-economic groups. Around half (48%) of ABC1 disabled consumers have pay TV at home, compared to 56% among non-disabled consumers in this group. Similarly, ownership is lower among disabled consumers in the C2DE group (45% vs. 53%). The most notable difference by type of disability is the higher-than-average ownership among ACB1s with a hearing impairment, which is broadly in line with ownership among non-disabled consumers.

Figure 1.23 Household pay-TV ownership, by SEG and household size



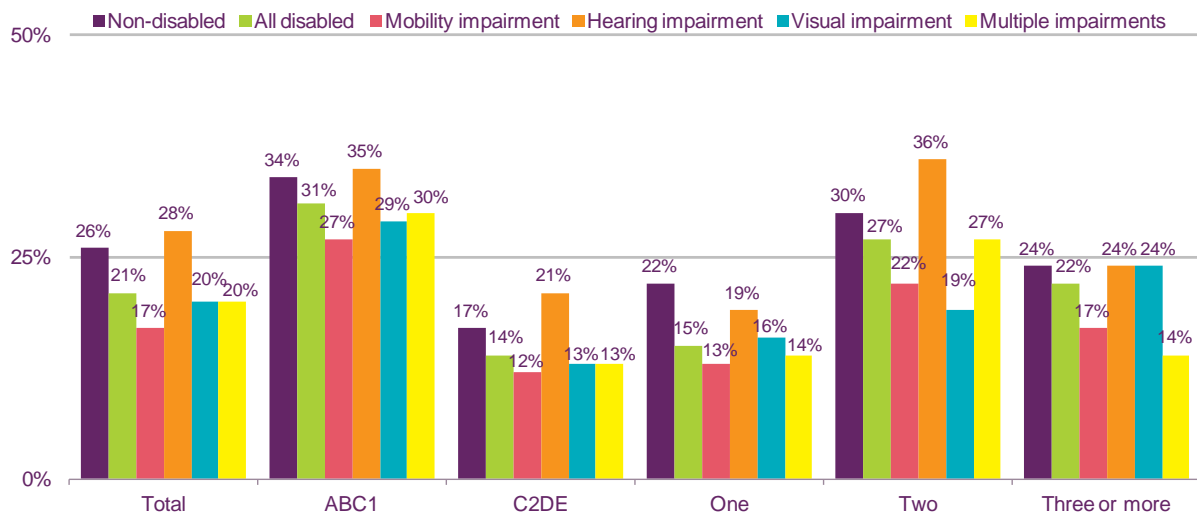
Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

Around one in four non-disabled people (26%) and one in five (21%) disabled people say they have a DAB radio in their home. People of all ages with a hearing disability are most likely to have one in the home. Ownership is flat across ages.

**A fifth of people with a hearing impairment living alone own a DAB radio; this disability group reports the highest DAB ownership.**

DAB ownership is higher in ABC1 households and in households with two people rather than single households or larger households. Ownership is highest among people with hearing impairments, and in fact a fifth of people with a hearing impairment, living alone, say they have a DAB radio.

Figure 1.24 Household DAB radio ownership, by SEG and household size



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, all disabled: 4,095, mobility impairment: 1,134, hearing impairment: 506, visual impairment: 367, multiple impairments: 636

## Section 5

# People with mobility impairment

## Introduction

In this section we look in more detail at people with mobility impairments, including the impact of different types of impairment.

The questions in the survey relating to this type of disability asked whether people could not walk at all or used a wheelchair, whether they could not walk very far or manage stairs (or only with difficulty) and whether people had a limited ability to reach.

People with a mobility impairment (as defined above) accounted for over one quarter (28%) of the total sample of disabled people, and was the most common type of single disability reported.

This section details the services and devices to which people with a (solus) mobility impairment have access, and provides more information on the impact of demographics and other factors. Where the sample allows, the types of mobility impairment are broken down further.

Previous research on behalf of Ofcom looked at the experience in the communications market of people with upper-body mobility and dexterity impairments. This found that communications services were highly valued, and the qualitative research found that people with upper body impairments using the internet found it valuable, especially for tasks such as shopping or banking, as they often found it difficult to leave the home and conduct these tasks physically. However, their disability often meant that difficulties using a keyboard and mouse limited the time they spent online, and so represented a barrier to extended internet use.<sup>8</sup>

## Key trends

- **People with mobility impairments have lower levels of smartphone, PC and internet access.** Ownership of many communications services is lower among disabled consumers, and for PC, smartphone and internet access the levels are lower still among people with mobility impairments.
- **Wheelchair users are the most likely to own or have access to each of these services/devices, but internet access remains low in comparison to non-disabled people.** The higher ownership of communications services, compared to that among people with other types of mobility impairment, may be a reflection of the larger household size and younger age profile of wheelchair users. Internet access, however, remains relatively low even among this group - 53% compared to 83% among non-disabled people.
- **Internet access levels are lower for all SEG bands among people with mobility impairment.** AB adults with mobility impairment have the highest incidence of internet access: 66% compared with the average for non-disabled AB consumers of 94%.

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<sup>8</sup> <http://stakeholders.ofcom.org.uk/binaries/research/consumer-experience/GfKNOP.pdf>

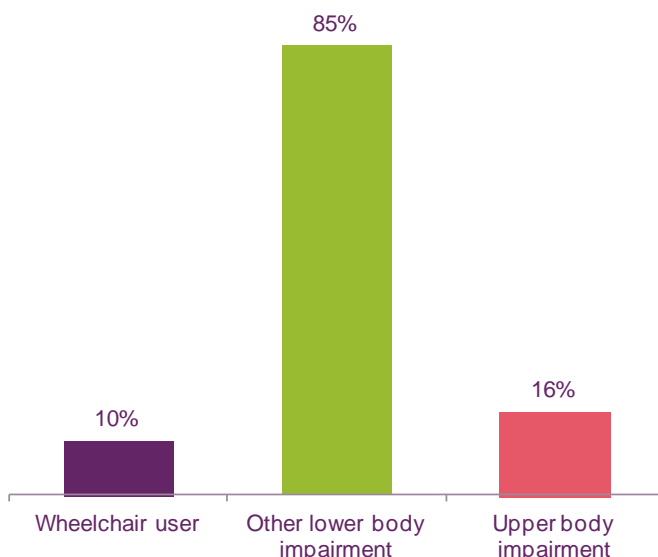
- **The gap in internet access between non-disabled people and those with mobility impairment is lowest among ABC1s aged under 65, at 96% vs. 89%.** However, among all C2DEs, and ABC1s aged over 65, the gap in access levels is significantly higher; at least 18 percentage points. This suggests that other factors, including disability, may be compounding the effects of age and income on internet access levels.
- **People with mobility impairments are lighter users of the internet** – seven in ten users use the internet at least daily. This compares to 85% among people without a disability.
- **Broadly comparable levels of pay-TV ownership exist among people with mobility impairment, compared to non-disabled consumers.** Age clearly influences the services people choose, with younger people more likely to have pay TV.

## Profile

**People with mobility impairments tend to be older and with the exception of wheelchair users, most have lower body impairment.**

Three types of mobility impairment have been grouped for analysis purposes: 10% of people with mobility impairment say they are wheelchair users and unable to walk, 85% say they have another type of lower body mobility impairment and 16% say they have upper body impairment. There is an overlap between these categories: 7% of the sample said they had a combination of mobility impairments e.g. limited walking and reaching ability are contained within both the lower body and upper body mobility-impaired samples. This analysis is based on these groups rather than discrete solus groups. People with upper body impairments include some people who also have problems walking and reaching.

Figure 1.25 Type of mobility impairment



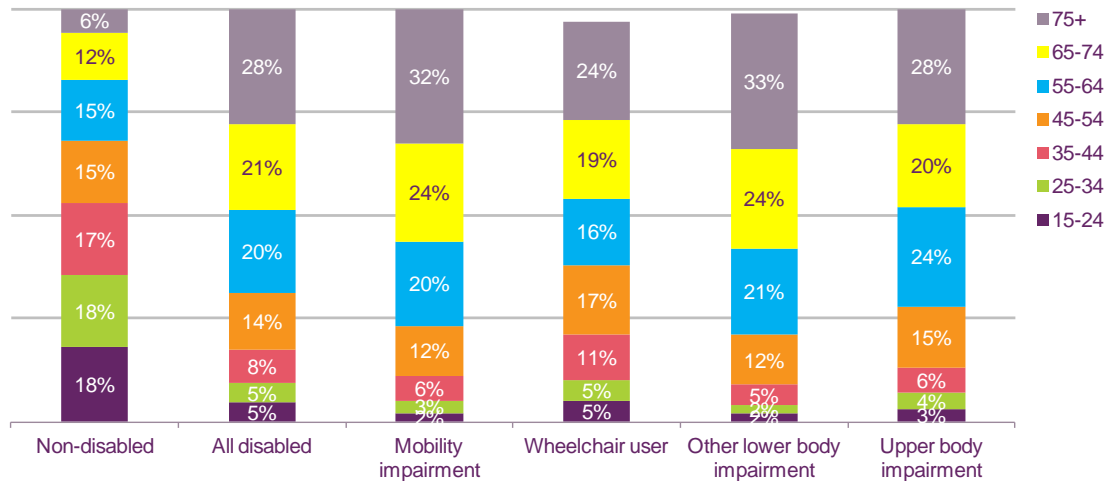
Source: British Population Survey, 2012: July – September 2012  
Base: all with mobility impairment: 1134

People with mobility impairments are significantly older than people with no disability, and comprise a larger proportion of people aged over 75; in this age band just under one in four

have a mobility impairment, either as a solus impairment or combined with hearing or visual impairment.

People with lower mobility impairment, other than wheelchair users, skew oldest, with over half (57%) aged over 65 and one in three aged over 75 (33%). Wheelchair users are more split, with a around a fifth aged under 45 as well as older users; this suggests a mix of people with lifelong conditions who use a wheelchair, and age-related disability. Just under half (48%) of people with upper body mobility impairment, which restricts the ability to reach, are aged over 65 and 28% are aged over 75.

Figure 1.26 Type of mobility impairment, by age



Source: British Population Survey, 2012: July – September 2012

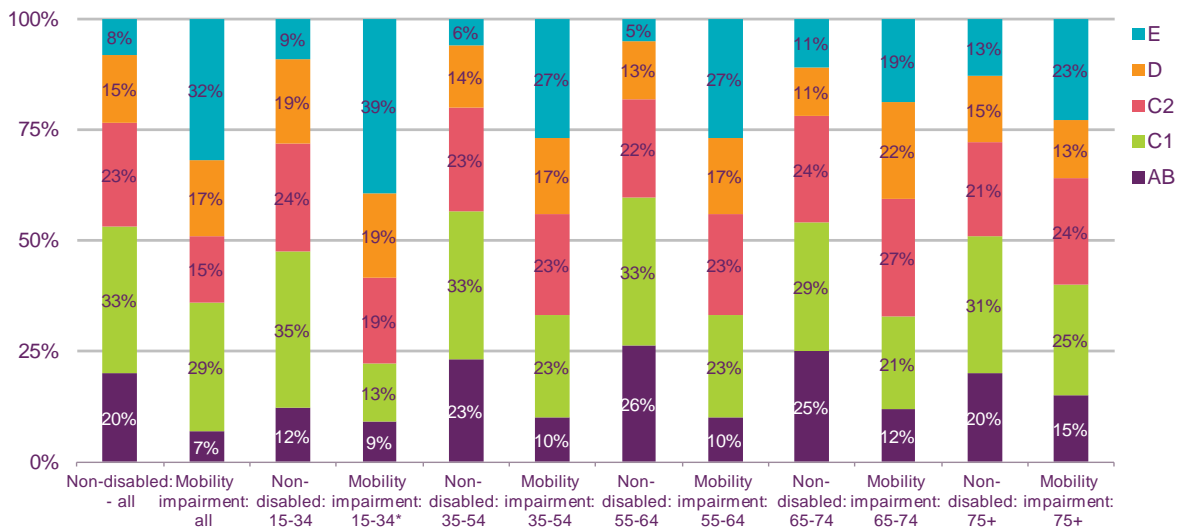
Base: non disabled: 17,412, all disabled, 4,095, mobility impairment: 1134, wheelchair users: 115, other lower body mobility impairment: 959, upper body impairment: 177. Some columns do not total 100% due to non-response.

There are no significant gender differences, although there is an indication that women have a higher tendency to upper body mobility impairments.

There is a higher proportion of people with mobility impairments in socio-economic group E, regardless of age. A gap between disabled and non-disabled remains until age 65, when the differences become less marked.



**Figure 1.27 Non-disabled and mobility impaired: socio-economic group comparison within age**



Source: British Population Survey, 2012: July – September 2012

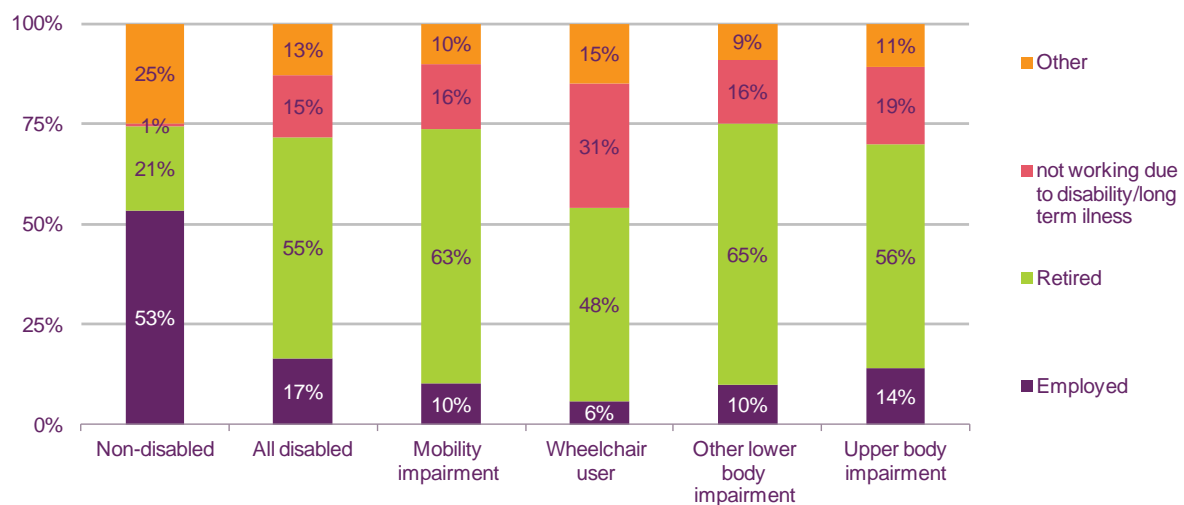
Base: non-disabled: 17,412, mobility impairment: 1134, non-disabled – 15-34: 6178, mobility impairment – 15-34: 59\*, non-disabled – 35-54: 5674, mobility impairment – 35-54: 207, non-disabled – 55-64: 2544, mobility impairment – 55-64: 229, non-disabled – 65-74: 1978, mobility impairment – 65-74: 269, non-disabled – 75+: 1006, mobility impairment – 75+: 366

\*Data for mobility impairment 15-34 indicative only as sample below 100 (59)

**Wheelchair users are the least likely to be employed, tend to live in larger DE households and therefore may be more susceptible to financial barriers.**

As mentioned earlier, people with mobility impairments are less likely to be employed and most likely not to be working due to long-term illness/disability. Wheelchair users are the least likely to be employed, and people with other lower-body impairments are the most likely to be retired, reflecting their older age profile.

**Figure 1.28 Mobility impairment type, by employment status**

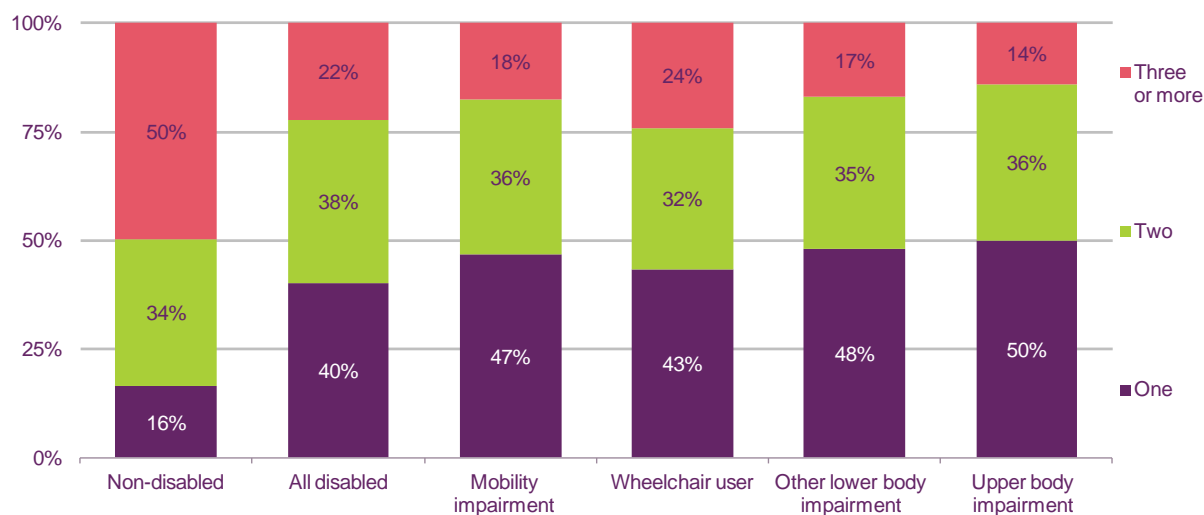


Source: British Population Survey, 2012: July – September 2012

Base: non-disabled: 17,412, all disabled, 4095, mobility impairment: 1134, wheelchair user: 115, other lower body mobility impairment: 959, upper body impairment: 177

People with mobility impairments are more likely than the combined average for disabled people to live alone, although those who use a wheelchair are less likely to live alone than people with other types of mobility impairment. Taking into account the fact that wheelchair users are more likely to fall into socio-economic groups DE, this may suggest that families with wheelchair users are more likely to encounter financial barriers when considering taking up communications services or devices. This is consistent with the Office for Disability Issues<sup>9</sup> analysis, which shows that a substantially higher proportion of individuals who live in families with disabled members 'live in poverty'.

Figure 1.29 Mobility impairment type, by size of household



Source: British Population Survey, 2012: July – September 2012

Base: non-disabled: 17,412, all disabled: 4095, mobility impairment: 1,134, wheelchair user: 115, other lower body mobility impairment: 959, upper body impairment: 177

## Ownership overview

### People with mobility impairments have lower levels of smartphone, PC and internet access.

The chart below summarises ownership of/ access to communications services and devices among people with different types of mobility impairment, and compares these to the average for non-disabled people and the average across all disabled people.

As noted above, ownership levels of many communications services are lower among disabled consumers and for PC, smartphone and internet access these levels are lower still among people with mobility impairments.

When looking at the types of mobility impairments people have, we see that wheelchair users are the most likely to own/ have access to each of these services/ devices, compared to people with other types of mobility impairment. Ownership is broadly comparable to the average across all disabled people, but significantly lower than the average for non-disabled people; for example, internet access stands at 53% among wheelchair users, 47% among all people with mobility impairments, but significantly higher (83%) among non-disabled people.

<sup>9</sup> <http://odi.dwp.gov.uk/disability-statistics-and-research/disability-facts-and-figures.php>

Figure 1.30 Household device/service ownership overview, by type of mobility impairment

	Non-disabled	All disabled	Mobility impairment	Wheelchair user	Other lower body impairment	Upper body impairment
Fixed Line	74%	79%	81%	79%	82%	81%
Any mobile	87%	81%	80%	77%	80%	80%
Smartphone	48%	27%	21%	26%	21%	21%
PC	79%	59%	52%	61%	50%	57%
Internet access*	83%	55%	47%	53%	45%	51%
Tablet	17%	10%	9%	10%	8%	9%
Pay TV	55%	46%	43%	50%	43%	42%
Freeview/Sat	53%	64%	64%	59%	64%	67%
DAB	26%	21%	17%	10%	17%	17%

Source: British Population Survey, 2012: July – September 2012

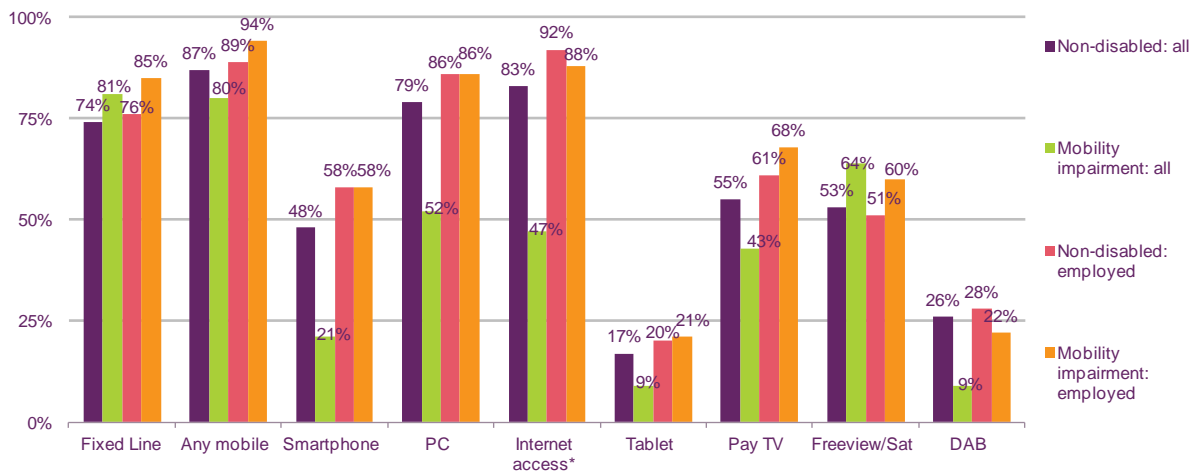
Base: non-disabled: 17,412, all disabled: 4095, mobility impairment: 1134, wheelchair user: 115, other lower body mobility impairment: 959, upper body impairment: 177

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.

### Being employed is associated with a higher level of service and device access.

As noted above, people with mobility impairments are the least likely to be in employment – only about one in ten say they are currently employed. Ownership of each communications service/device is significantly higher among people in employment with a mobility impairment than among those not employed; for example, mobile ownership rises from 80% to 94% among those currently in employment, and PC ownership rises from 52% to 86%.

Figure 1.31 Household service ownership/ access, by employment status



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, mobility impairment : 1,134, non-disabled employed: 9,273, mobility impairment employed: 117

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.

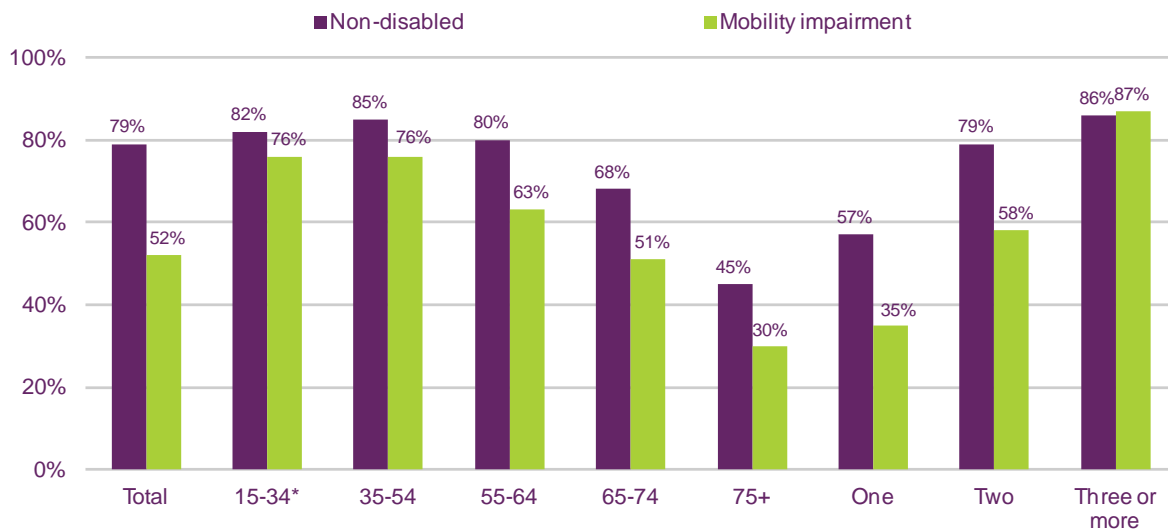
## Focus on internet

### PC ownership and internet access skew younger among people with mobility impairments, and take-up is higher in larger households.

As noted earlier, PC ownership is lower than the disabled average among people with mobility impairments. The incidence falls off after the age of 55, when the difference between mobility-impaired people, and people with no disability, becomes more pronounced.

Take-up of PCs in larger households with a mobility-impaired member is the same as for non-disabled people. However, take-up in single-person households is significantly lower: 35% compared with 57%. This may be a function of age, or because the mobility impairment is an impediment.

**Figure 1.32 Household PC ownership, by age and household size: mobility-impairment**



Source: British Population Survey, 2012: July - September 2012

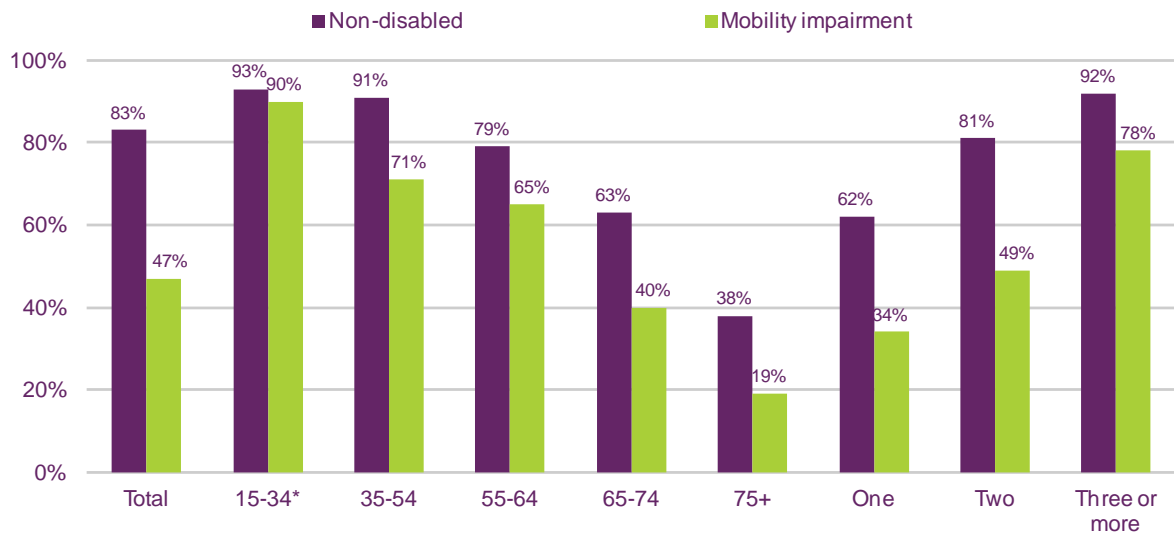
Base: non-disabled: 17,412, mobility impairment: 1,134

\*Data for mobility impairment 15-34 indicative only as sample below 100 (59)

As seen earlier in Figure 1.31, people with mobility impairment are less likely than those with hearing or visual impairments to have internet access, and wheelchair users are more likely than those with upper body impairments to have internet access. Internet access among people with mobility impairments skews young, and is higher in larger households. After the age of 65 the difference between mobility impaired and non-disabled adults becomes more marked. The qualitative research conducted by Ofcom pointed to the fact that set-up and installation was an important barrier to use of televisions and computers, and there was low awareness of adaptive technologies.<sup>10</sup>

<sup>10</sup> <http://stakeholders.ofcom.org.uk/binaries/research/consumer-experience/GfKNOP.pdf>

**Figure 1.33 Personal internet access, by age and household size: mobility impairment**

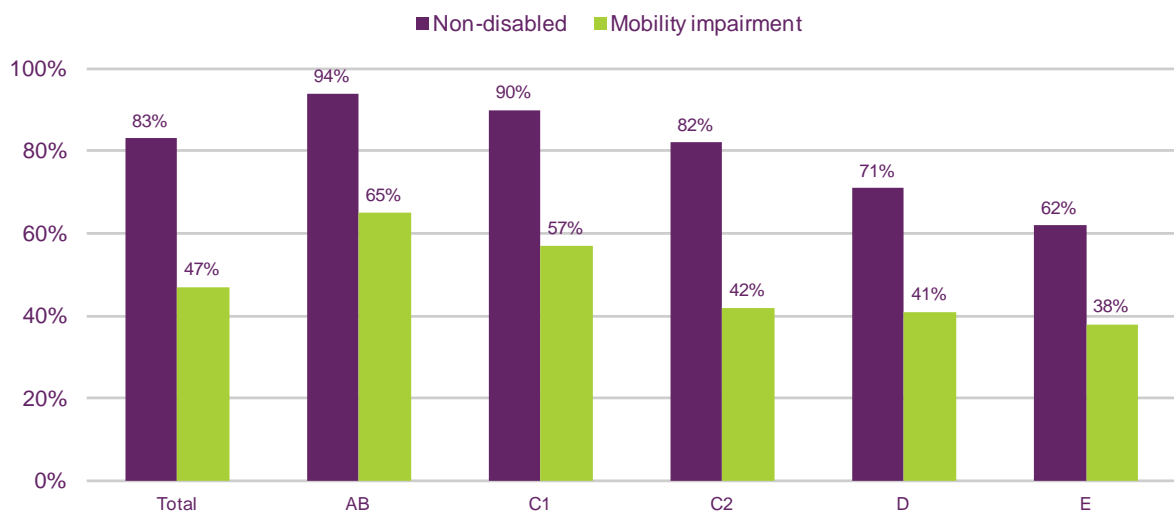


Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, mobility impairment: 1134  
 \*Data for mobility impairment 15-34 indicative only as sample below 100 (59)

**Internet access levels are lower for all SEG bands among people with mobility impairments.**

Comparing internet access by socio-economic group among people with mobility impairments and those without any disability highlights significantly lower levels of access among those with mobility impairments, regardless of socio-economic group.

**Figure 1.34 Personal internet access, by detailed socio-economic group: mobility impairment**

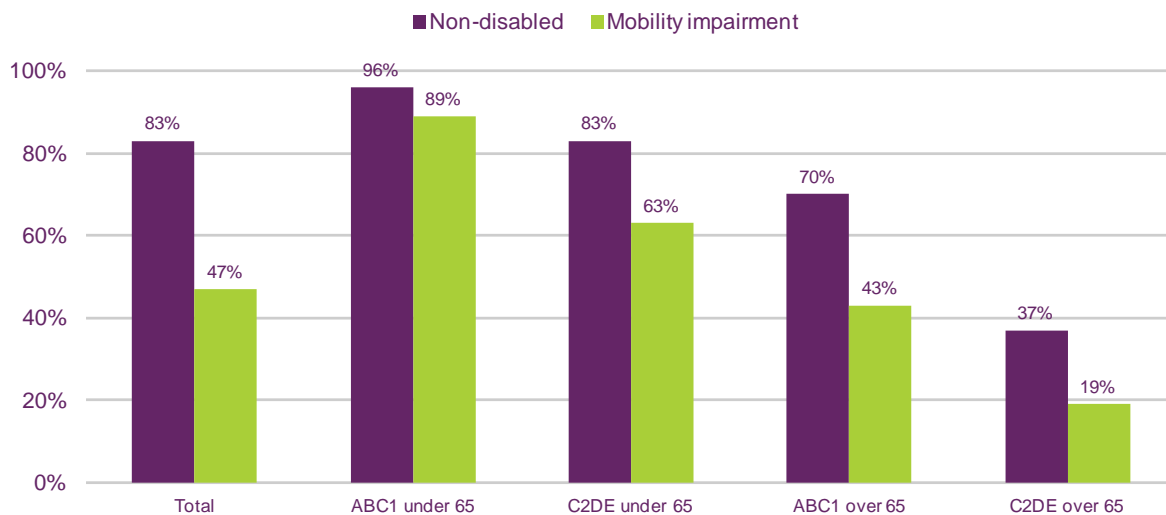


Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, mobility impairment: 1134

## The gap in internet access between non-disabled people and those with mobility impairment is lowest among ABC1s aged under 65.

Among ABC1s aged under 65 the gap in internet access levels between people with no disability and those with mobility impairment is at its smallest; 96% vs. 89%. However, among all C2DEs and ABC1s aged over 65 the gaps in access levels are significantly higher and at least 18 percentage points. This suggests that other factors, including disability, compounds the effects of age and income on internet access.

Figure 1.35 Personal internet access, by combined age and socio-economic group: mobility impairment



Source: British Population Survey, 2012: July - September 2012  
Base: non-disabled: 17,412, mobility impairment: 1134

## People with mobility impairments are lighter users of the internet – seven in ten users use the internet at least daily.

As noted earlier, people with mobility impairments, in line with disabled people as a whole, are most likely to access the internet at home rather than elsewhere. They are also likely to be newer to the internet, and lighter users. There are no significant differences by mobility impairment type.

Figure 1.36 Internet use, by type of mobility impairment

		Non-disabled	Mobility impairment	Wheelchair user*	Other lower body impairment	Upper body impairment*
Where internet is accessed	Home	96%	96%	97%	97%	97%
	Other Location	36%	13%	10%	13%	14%
	Mobile	35%	17%	10%	17%	20%
Length of time of internet access	0-3 years	10%	16%	17%	16%	16%
	3-6 years	16%	19%	14%	18%	18%
	6+ years	73%	65%	69%	65%	60%
Frequency of internet usage	More than daily	66%	48%	59%	48%	44%
	Daily	19%	22%	20%	23%	17%
	Less often	16%	30%	21%	29%	39%

Source: British Population Survey, 2012: July - September 2012

Base: adults with internet access: non-disabled: 14,539, mobility impairment: 529, wheelchair user: 61, other lower body impairment: 429, upper body impairment: 90

\*Data for wheelchair user and upper body impairment indicative only as sample below 100.

Younger people are heavier internet users than older users; 56% of mobility-impaired adults under 65 with internet access use the internet more often than daily, compared with 33% of mobility-impaired adults aged over 65. The comparable figures for non-disabled people are 70% and 37%.

As noted in Section 4, the most popular internet activities are (in order): email, information, shopping, banking, social networking and audio-visual entertainment. There are no significant differences between people with different types of impairment.



Figure 1.37 Internet use, by type of mobility impairment

		Non-disabled	Mobility impairment	Wheelchair user*	Other lower body impairment	Upper body impairment*
Type of internet usage	Email	92%	84%	80%	84%	89%
	Information	89%	77%	67%	78%	71%
	Shopping - all	66%	59%	57%	60%	59%
	Shopping - groceries	18%	19%	25%	21%	16%
	Social networking	55%	43%	49%	44%	39%
	Banking	53%	41%	38%	42%	40%
	AV entertainment	39%	25%	15%	26%	22%
	Job search	22%	12%	10%	10%	20%
	Gaming/gambling	18%	15%	11%	16%	16%

Source: British Population Survey, 2012: July - September 2012

Base: adults with internet access: non-disabled: 1, 4539, mobility impairment: 529, wheelchair user: 61, other lower body impairment: 429, upper body impairment: 90

\*Data for wheelchair user and upper body impairment indicative only as sample below 100.

A closer look at the influence of age and SEG reveals that age in particular influences the type of activity undertaken. People aged under 54 with a mobility disability are more likely than people over 75 to do most activities (other than emailing or searching for information).

While shopping overall skews younger, grocery shopping is also undertaken by just under one in four people aged over 75 (23%). Forty per cent of people aged 15-34 use the internet for job searching, compared with 12% of all mobility-impaired adults. Gaming and/or gambling, and using the internet to access AV content (music, video or TV), skew towards people aged under 34.

## Focus on telecoms

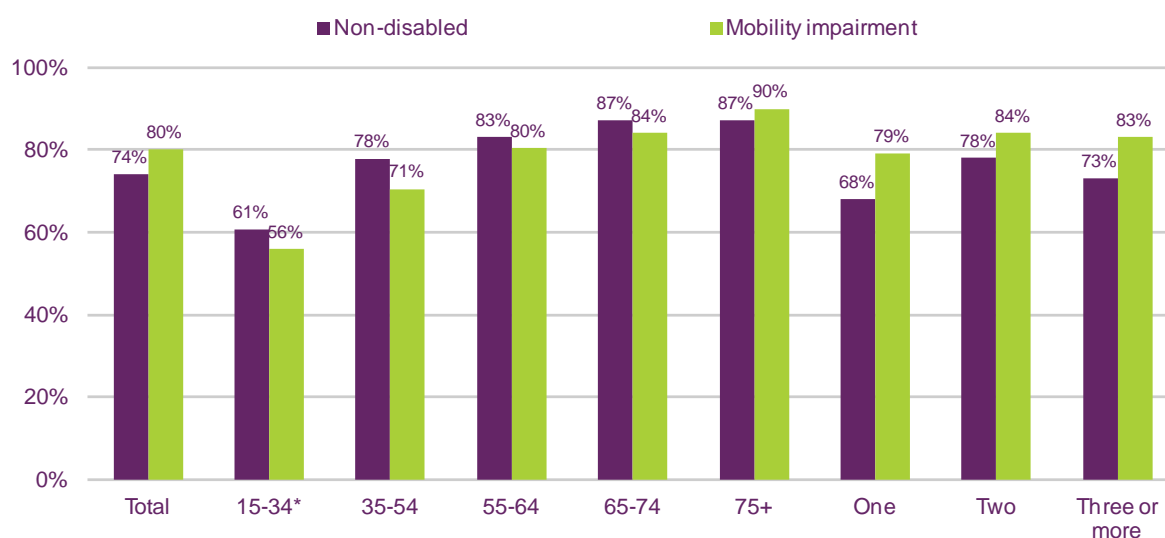
### Fixed-line ownership is higher in single-person homes for people with a mobility impairment (79%) than in non-disabled single-person homes (68%)

As noted above, people with mobility impairments are more likely to have access to a fixed line at home if they are older rather than younger, and the incidence is similar to the disabled average. Ofcom's qualitative research found that telephones were felt to be a lifeline if there was a medical issue/emergency, but were also valued from a social point of view.<sup>11</sup>

Overall, 80% of people with mobility impairment have access to a fixed line. Among 15-34 year olds this is just over half, at 56%, but rises to 71% among 35-54 year olds and 90% of over-75s.

<sup>11</sup> <http://stakeholders.ofcom.org.uk/binaries/research/consumer-experience/GfKNOP.pdf>

Figure 1.38 Fixed-line ownership, by age and household size: mobility impairment



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, mobility impairment: 1,134

\*Data for mobility impairment 15-34 indicative only as sample below 100 (59).

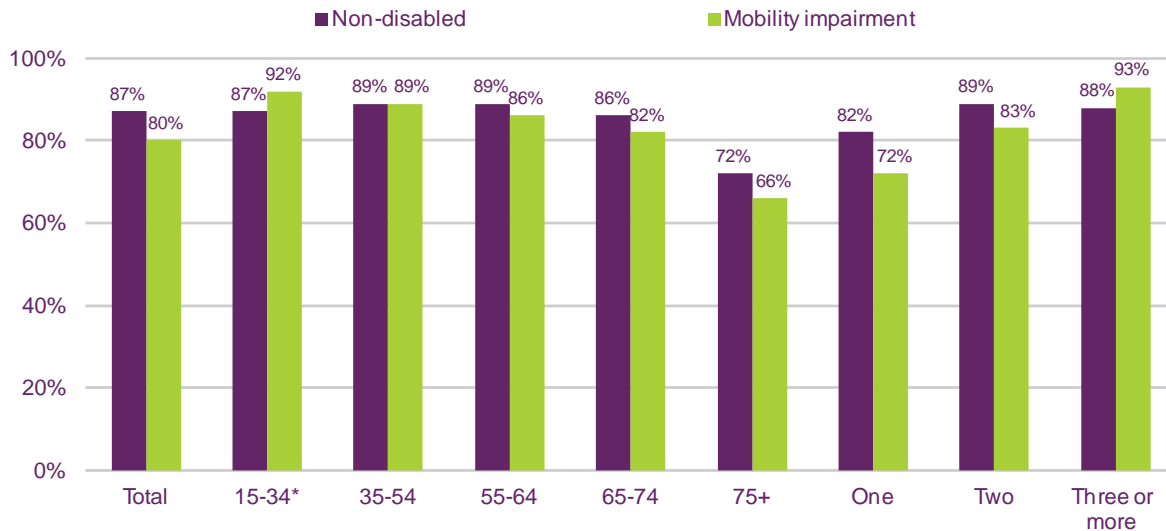
Further analysis of detailed SEG shows that people in the D and E categories are less likely than others to have a fixed line. However, access is higher than among non-disabled people; a reflection of the different age profiles of the two groups.

**People with a mobility impairment living alone are more likely to have a fixed line but less likely to have a mobile than non-disabled people living alone.**

As noted earlier, mobile phone ownership is widespread among people of all ages other than the over-75s, among disabled and non-disabled alike.

Further analysis of the demographics shows a familiar pattern, with lower ownership levels among older people. While people with a mobility impairment living in a single-person household are more likely to have a fixed line, they are less likely than non-disabled single-person households to have a mobile, at 72% vs. 82%.

**Figure 1.39 Any mobile phone in the home, by age and household size: mobility impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, mobility impairment: 1,134

\*Data for multiple impairment 15-34 indicative only as sample below 100 (59).

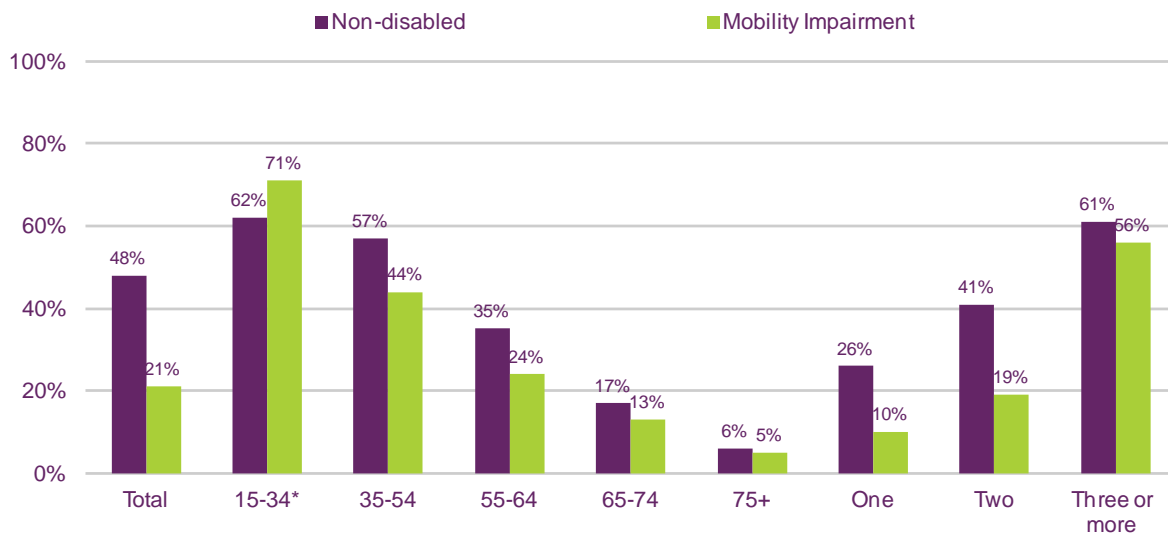
Smartphone access is more limited, and the difference between disabled and non-disabled more marked. Less than half as many people with a mobility impairment have access to a smartphone in their home, compared to non-disabled people (21% vs. 48%).

With the exception of 15-34 year olds, levels of home smartphone access are lower for people with a mobility impairment than for those without a disability, across all age ranges. One in ten people with a mobility impairment living alone have a smartphone, compared with 26% of non-disabled adults living alone.

Ofcom's qualitative research provides some indication of the issues that may influence use of mobile phones. It found that those who had dexterity and speech impairment issues found using a telephone (both mobile and fixed line) difficult, and the size of the mobile phone, and the size and spacing of buttons, were frequently mentioned as being problematic.<sup>12</sup>

<sup>12</sup> <http://stakeholders.ofcom.org.uk/binaries/research/consumer-experience/GfKNOP.pdf>

**Figure 1.40 Any smartphone in the home, by age and household size: mobility impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, mobility impairment: 1,134

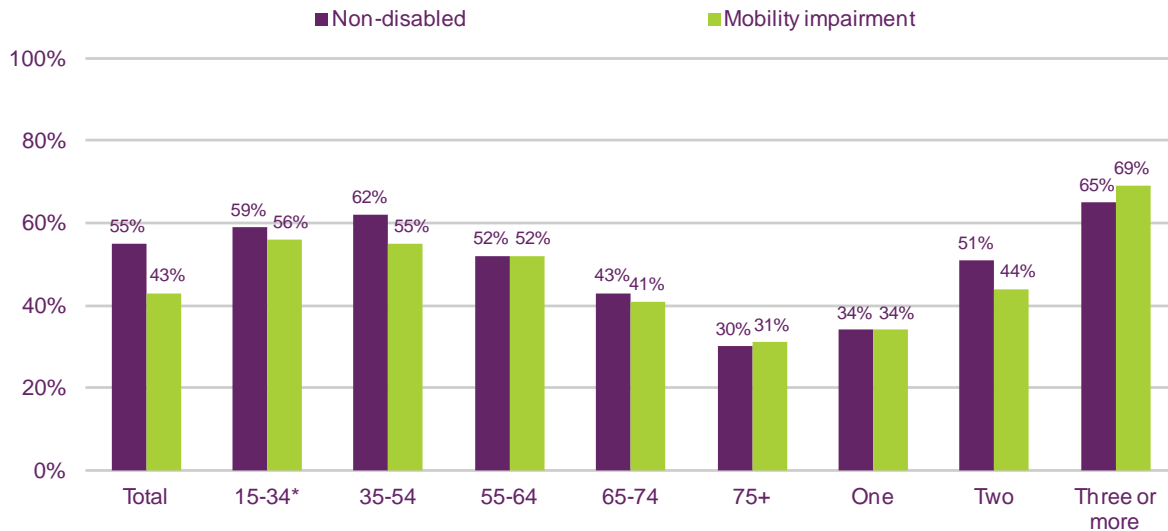
\*Data for multiple impairment 15-34 indicative only as sample below 100 (59).

## Focus on broadcast

### **Broadly comparable levels of pay-TV ownership among people with mobility impairment and non-disabled consumers, by age and household size.**

Age clearly influences the services people choose, with younger people more likely to have pay TV. There are no significant differences between mobility types, although wheelchair users recorded higher levels of pay TV access.

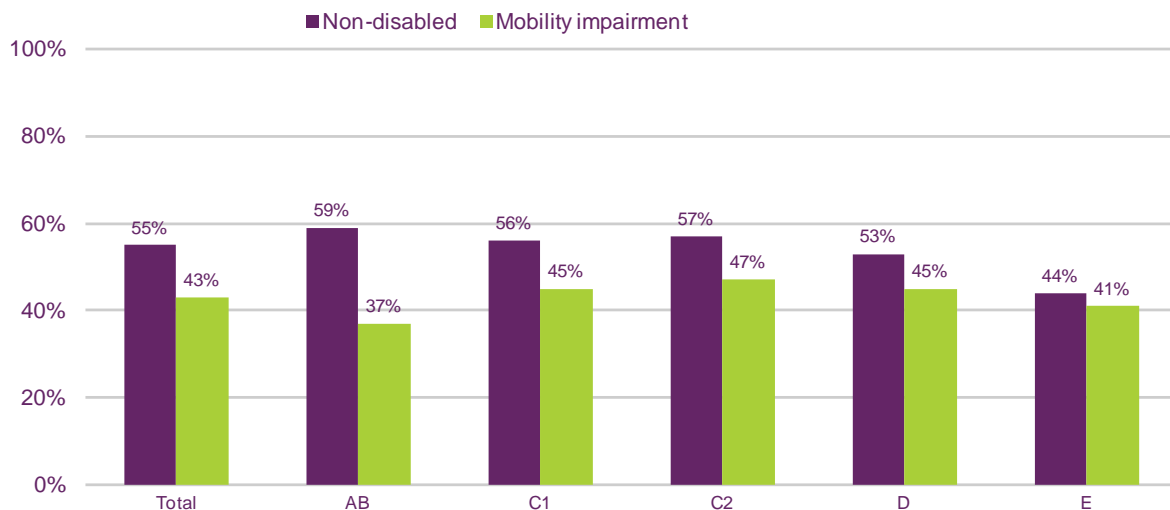
**Figure 1.41 Any pay TV in the home, by age and household size: mobility impairment**



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, mobility impairment: 1,134  
 \*Data for multiple impairment 15-34 indicative only as sample below 100 (59).

Pay TV levels are lower in all SEG bands, but the largest differences between people with mobility impairment and non-disabled can be found among AB adults: 37% of mobility impaired adults have pay TV, compared with 59% of non-disabled people.

**Figure 1.42 Any pay TV in the home, by socio-economic group: mobility impairment**



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, mobility impairment: 1,134

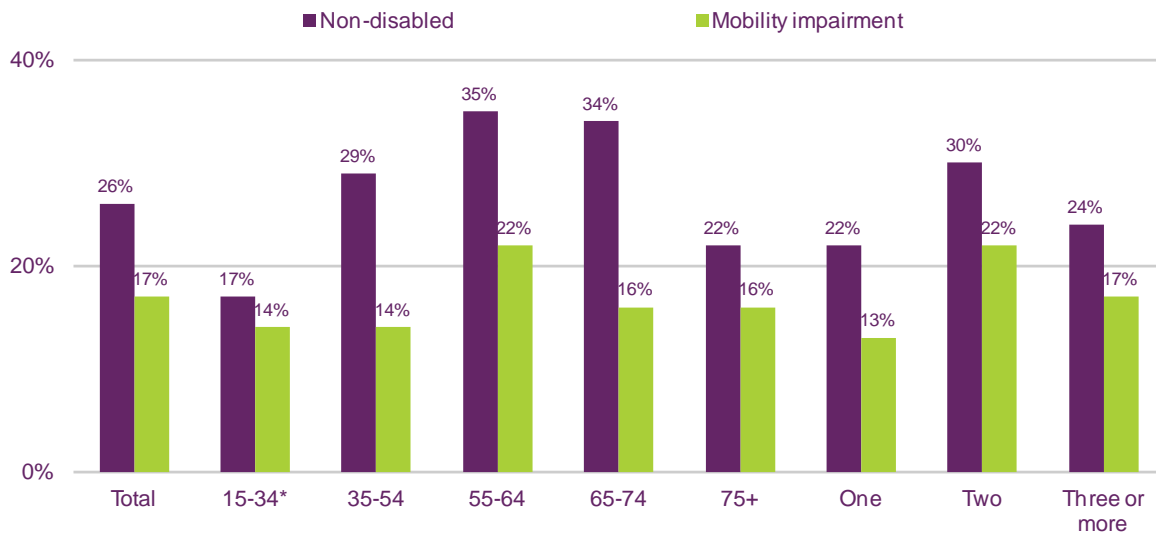
Ofcom’s qualitative research found that TV is highly valued for entertainment and companionship; a high number of participants spent much of their time at home due to their disability. However, some mentioned problems with TV remote controls, e.g. button size and

spacing, and difficulties replacing batteries and set up/installation is also a barrier to use of TV. Pay TV was seen as too expensive for some.<sup>13</sup>

**DAB ownership is lower among people with mobility impairments, regardless of age or household size.**

DAB radio is present in the homes of 17% of people with mobility impairments. DAB radio access is most likely to be found among 55-64 year olds and in two-person households.

**Figure 1.43 Any DAB in the home, by age and household size: mobility impairment**



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, mobility impaired: 1,134  
 \*Data for multiple impairment 15-34 indicative only as sample below 100 (59).

<sup>13</sup> <http://stakeholders.ofcom.org.uk/binaries/research/consumer-experience/GfKNOP.pdf>

## Section 6

# People with hearing impairment

## Introduction

This section looks in more detail at people with hearing impairment. It details the services and devices that they have in their homes, or have access to, and provides more information on the impact of demographics and other factors. People with solus hearing impairments accounted for 12% of the sample of disabled consumers.

## Key trends

- **People with hearing impairments are more likely than those without a disability to own a fixed line, and have comparable levels of DAB ownership.** People with a hearing impairment have higher levels of ownership of most services, compared to people with other types of disability or impairment. Internet access, home fixed line, and DAB ownership are all higher than the disabled average among people with a hearing impairment. Fixed-line ownership is higher among those with a hearing impairment compared to non-disabled people.
- **Lower aggregate internet access levels are largely explained by the varying demographic profile of people with a hearing impairment.** However, for some older people with a hearing impairment factors other than age and income may be further limiting this. Among ABC1s aged under 65, internet access is broadly comparable regardless of disability and not significantly different for C2DEs in this age band. However, differences (less prominent than other disability groups) are noted among the older sample across both broad SEG groups.
- **People with hearing impairments have relatively high levels of home landline, mobile phone and smartphone ownership.** Smartphone ownership is broadly comparable within each of the broad SEG groups among those aged under 65, when comparing those with a hearing impairment to non-disabled people.
- **Pay-TV levels are relatively high in homes with hearing-impaired adults.** Ownership is higher than the average among non-disabled people, across all age bands and household sizes, with the exception of single-person households, where pay TV is less prominent among those with a hearing impairment.

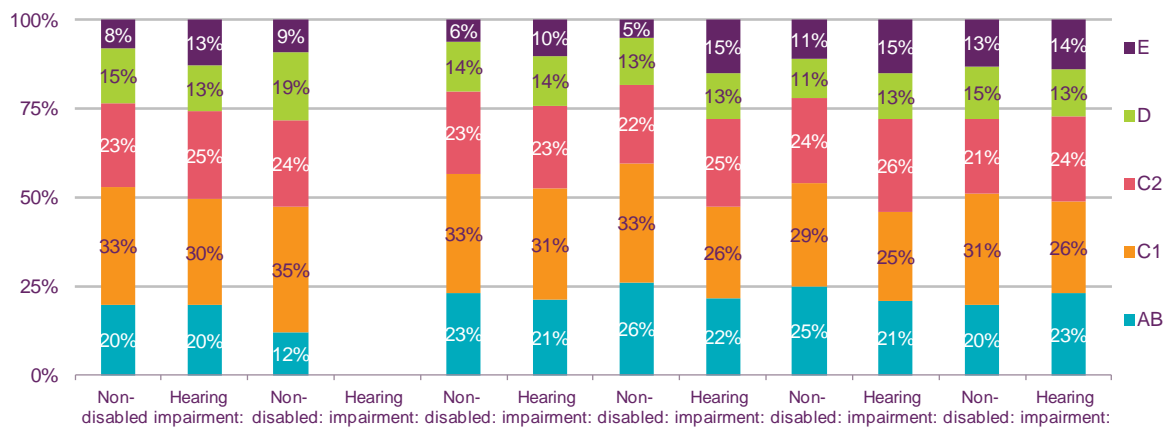
## Profile

### **People with hearing impairment are older and more likely to be male, but have a similar SEG profile to non-disabled people at all ages**

Over half (57%) of people with a hearing impairment are aged over 65, compared with 49% of all disabled people and 17% of non-disabled people. Thirty per cent are aged over 75. There is a gender bias for hearing impairment, with 61% male and 39% female.

The socio-economic group profile of people with hearing impairments is broadly comparable to that of non-disabled consumers; i.e. around half in ABC1 and half in C2DE. However, people with a hearing impairment are older, so a greater proportion of each broad socio-economic group are aged 65+, and consequently, fewer are aged 15-54.

**Figure 1.44 Profile of people with hearing impairments and non-disabled, by socio-economic group within age**



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, hearing impairment: 506, non-disabled 15-34: 6178, hearing impairment 15-34: 45\*\*, non-disabled 35-54: 5674, hearing impairment 35-54: 70\*, non-disabled 55-64: 2544, hearing impairment 55-64: 89\*, non-disabled 65-74: 1978, hearing impairment 65-74: 139, non-disabled 75+: 1006, hearing impairment 75+: 154  
 \*Data for hearing impairment 35-54 and 55-64 indicative only as sample below 100 (70 and 89).  
 \*\*Data for hearing impairment 15-34 not presented as sample below 50 (45).

As shown in Section 3, consistent with the older age profile, a higher proportion of people with hearing impairment are retired and not working. Just under two-thirds (64%) of people with a hearing impairment are retired and 25% are working. This compares with 21% retired and 53% working among non-disabled people.

Section 3 also notes that of all the disability types, people with a hearing impairment are most likely to live with one other person: 35% live alone, 45% live in a two-person household, and 21% live in a household with three or more members. This compares with 16% of non-disabled adults living alone, 34% living in a two-person home, and 50% living in a home with three or more people.

## Ownership overview

### People with hearing impairments are more likely than those without a disability to own a fixed line, and have comparable levels of DAB ownership.

People with a hearing impairment have higher levels of ownership of most services compared to people with other types of disability or impairment. Internet access, home fixed lines and DAB ownership are all higher among people with a hearing impairment than the disabled average. Fixed-line ownership is higher among those with a hearing impairment than among non-disabled people, and DAB ownership is comparable.



Figure 1.45 Household device/service ownership overview: hearing-impaired

	Non-disabled	All disabled	Hearing impairment
Fixed Line	74%	79%	84%
Any mobile	87%	81%	82%
Smartphone	48%	27%	28%
PC	79%	59%	59%
Internet access*	83%	55%	64%
Tablet	17%	10%	9%
Pay TV	55%	46%	48%
Freeview/Sat	53%	64%	63%
DAB	26%	21%	27%

Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, all disabled: 4,095, hearing impairment: 506

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.

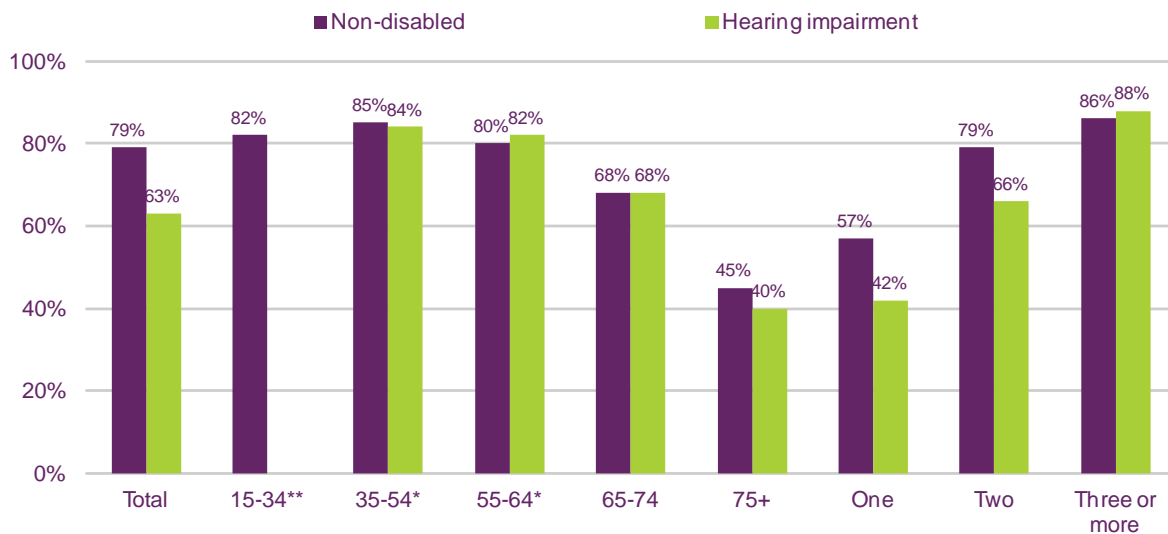
## Focus on internet

### PC ownership among people with hearing impairments is comparable to non-disabled people across most age groups.

PC ownership, and, consequently, internet access, among hearing-impaired people, by age, matches incidence among non-disabled people, with higher levels among younger people. The larger the household, the higher the incidence of PC ownership and internet access.

PC ownership levels are similar to those for non-disabled people for most age bands. The overall lower ownership/access levels are due to the older profile of the hearing-impaired sample, and consequently, the higher incidence within that sample of people who do not have these services. PC ownership is lower among people aged 75 and over, and people in one- or two-person households, who tend to be older.

**Figure 1.46 Household PC ownership, by age and household size: hearing impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, hearing impairment: 506

\*Data for hearing impairment 35-54 and 55-64 indicative only as sample below 100 (70 and 89).

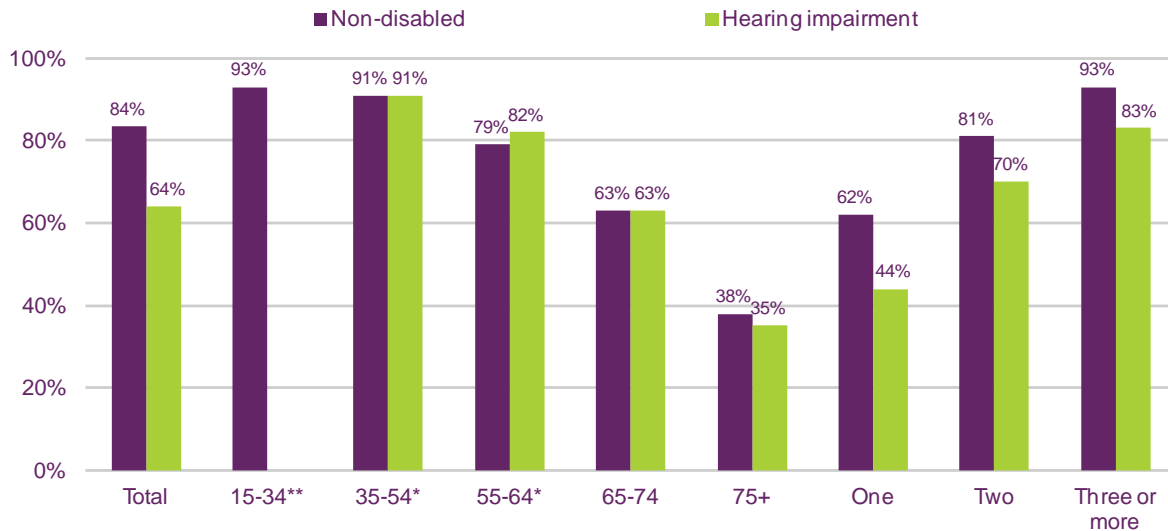
\*\*Data for hearing impairment 15-34 not presented as sample below 50 (45).

**For some older people with a hearing impairment, their disability may limit their internet access.**

As noted earlier, people with a hearing impairment are more likely than any other disability group to have internet access, regardless of age. As with PC ownership, people with a hearing impairment have similar levels of access to the internet as non-disabled people. The differing age profile leads to overall lower recorded levels, as older people, whether non-disabled or hearing-impaired, still lag behind younger people.

However, people living alone with a hearing impairment have lower levels of internet access than non-disabled people; this is likely to reflect the older age profile of hearing-impaired people living alone.

**Figure 1.47 Personal internet access, by age and household size: hearing impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, hearing impairment: 506

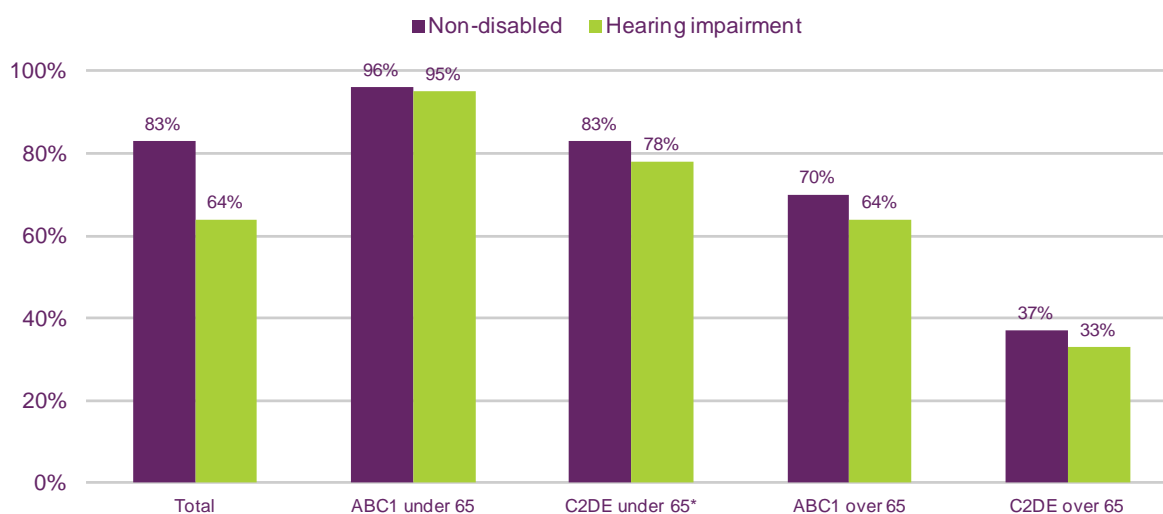
\*Data for hearing impairment 35-54 and 55-64 indicative only as sample below 100 (70 and 89).

\*\*Data for hearing impairment 15-34 not presented as sample below 50.

By exploring access levels within socio-economic and broad age groups, we are better able to understand to what extent factors other than age and income (e.g. hearing impairment) may influence ownership.

As shown in the chart below, ABC1s aged under 65 report broadly comparable levels of internet access, regardless of disability. Furthermore, internet access is not significantly different for C2DEs with hearing impairments in this age band, compared to non-disabled consumers. Slight, but significant differences can be seen among the older sample, across both broad SEG groups, suggesting that the impairment may be compounding the effects of age on internet access for some consumers.

Figure 1.48 Personal internet access, by age and SEG: hearing-impaired



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, hearing impairment: 506

\*Data for hearing impairment C2DE under 65 indicative only as sample below 100 (95).

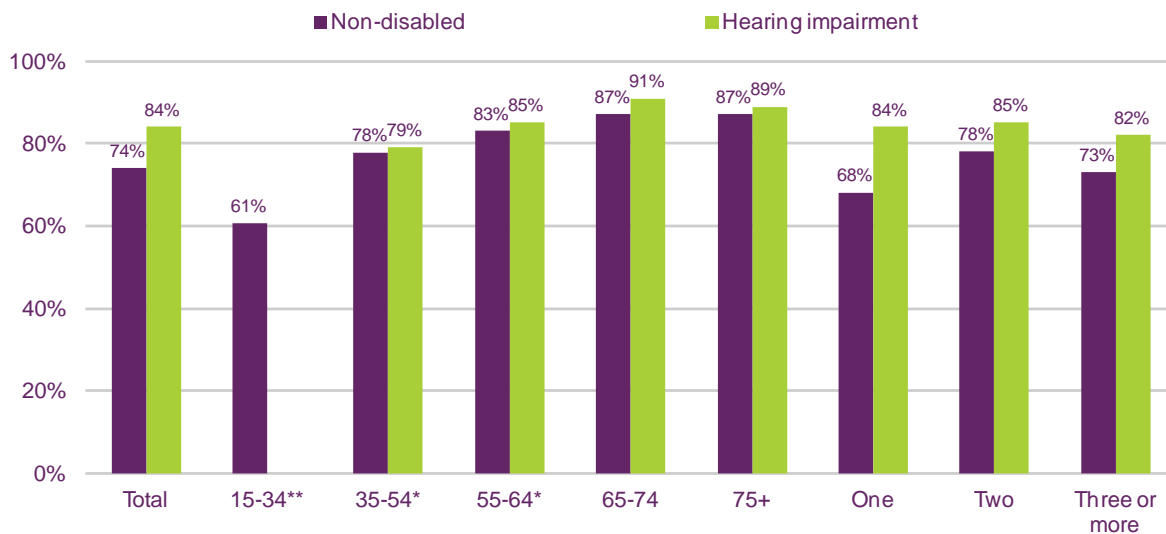
## Focus on telecoms

### People with hearing impairments have relatively high levels of home fixed-line, mobile phone and smartphone ownership.

People with hearing impairments have the highest incidence of home fixed-line ownership: 84% compared with 79% average among all disabled people.

Fixed-line ownership rises with age and remains comparable to, or higher than, average for each age group; it does not vary significantly by household size. Single person (disabled-only) households are as likely to own a fixed line as are households with 3+ people (84%: one person, 85%: two people, 82%: three+ people).

**Figure 1.49 Household fixed-line ownership, by age and household size: hearing impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, hearing impairment: 506

\*Data for hearing impairment 35-54 and 55-64 indicative only as sample below 100 (70 and 89).

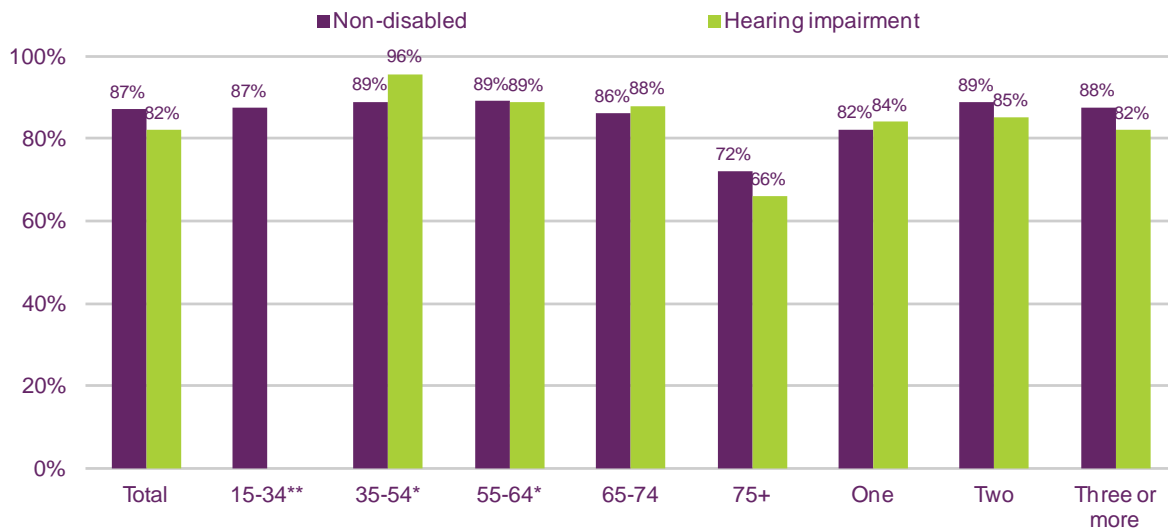
\*\*Data for hearing impairment 15-34 not presented as sample below 50 (45).

Most (82%) people with a hearing impairment have a mobile phone in their household. Ownership is lowest among those aged 75+. Within single-person (disabled-only) households, ownership stands at 84%.

Ofcom's qualitative research found that mobile telephony, with its focus on text-based communication, was felt to have changed the lives of many people with a hearing impairment, and enabled them to communicate using a convenient, mainstream method.<sup>14</sup>

<sup>14</sup> <http://stakeholders.ofcom.org.uk/binaries/research/consumer-experience/annex5.pdf>

**Figure 1.50 Household mobile phone ownership, by age and household size: hearing impairment**



Source: British Population Survey, 2012: July - September 2012

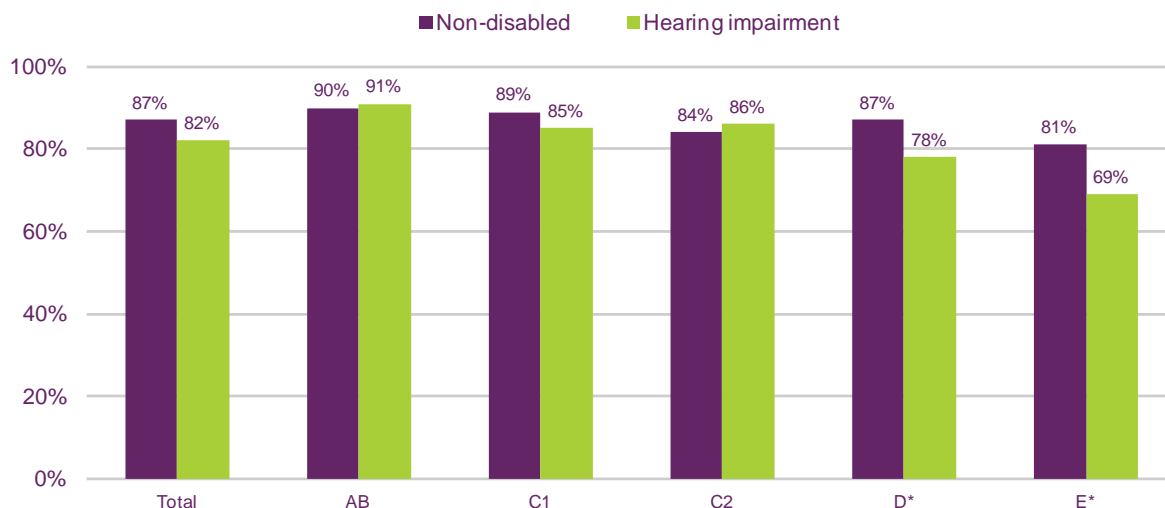
Base: non-disabled: 17,412, hearing impairment: 506

\*Data for hearing impairment 35-54 and 55-64 indicative only as sample below 100 (70 and 89)

\*\*Data for hearing impairment 15-34 not presented as sample below 50 (45)

Ownership of a mobile phone in the household is lowest among the DE socio-economic groups, at between 69% and 78%. Ownership among each of the other SEGs is broadly comparable to that among non-disabled consumers.

**Figure 1.51 Household mobile phone ownership, by socio-economic group: hearing impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, hearing impairment: 506

\*Data for hearing impairment D and E indicative only as sample below 100 (64 and 65)

People with hearing impairments also have relatively high ownership of a smartphone in the home. Two-thirds (66%) of 35-54 year olds say they have at least one smartphone in the household, compared with 57% of non-disabled adults of the same age.

Smartphone ownership drops off at age 55+ among people with a hearing impairment, which is consistent with the trend and levels noted among non-disabled consumers.

Fifteen per cent of single-person (disabled-only) households have a smartphone; this is lower than for non-disabled single-person households, and is likely to be correlated with the older age profile of people with hearing impairments.

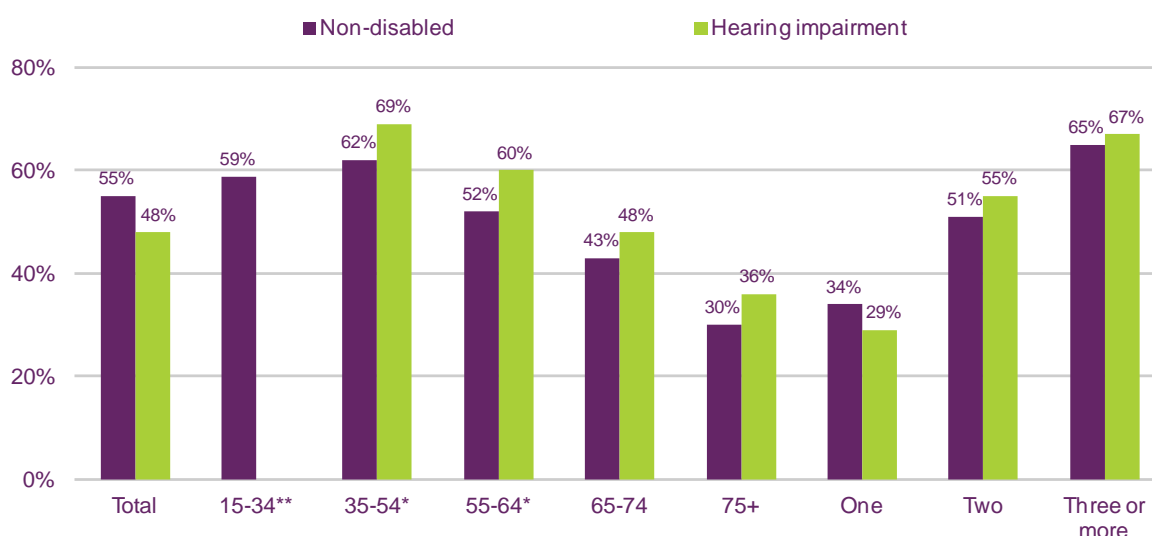
## Focus on broadcast

We know from qualitative research that people with hearing impairments value TV as a window into the wider world and that subtitling on TV is widely used and highly valued.<sup>15</sup>

### Pay-TV ownership is higher than average among people with hearing impairments, in each age band

Household ownership of pay-TV services is higher across all age bands, and lower only in single-person households<sup>16</sup>. The lower overall incidence among people with hearing impairments can be explained by the different age profiles. Pay TV is less prominent among older people, who account for a larger proportion of the hearing-impaired sample.

Figure 1.52 Household pay-TV ownership, by age and household size: hearing impairment



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, hearing impairment: 506

\*Data for hearing impairment 35-54 and 55-64 indicative only as sample below 100 (70 and 89)

\*\*Data for hearing impairment 15-34 not presented as sample below 50 (45)

Pay TV levels are lower among people in the socio-economic group E. This is most likely to be age-related, as nearly a third (31%) of people with hearing impairment in this socio-economic group are aged 75 or over, compared with 9% for non-disabled people.

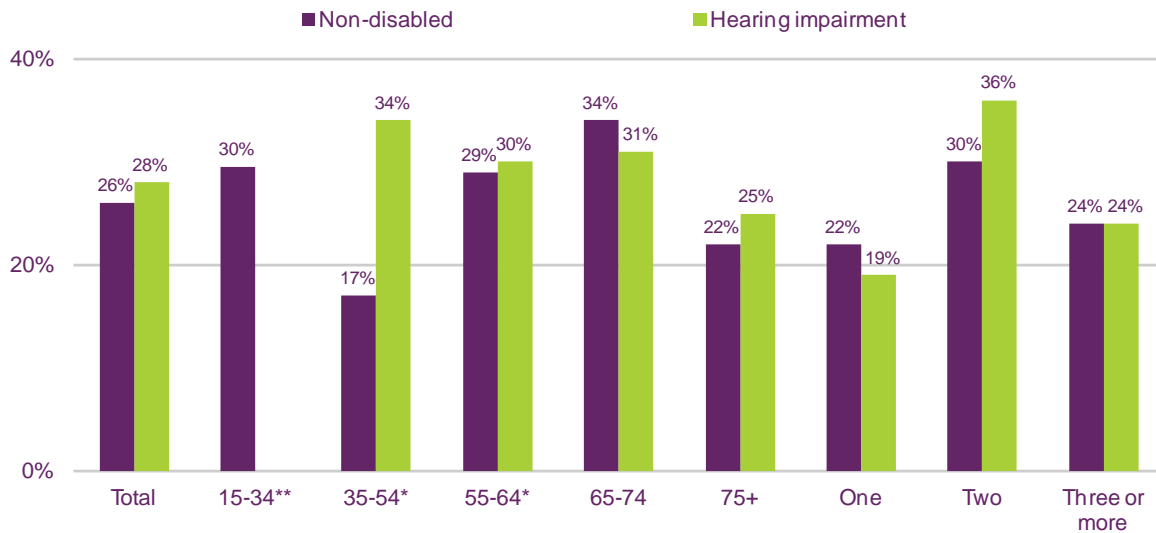
<sup>15</sup> <http://stakeholders.ofcom.org.uk/binaries/research/consumer-experience/annex5.pdf>

<sup>16</sup> The lower average level of pay-TV ownership (48% vs. 55%) is driven by the older age profile of people with hearing impairments i.e. it is skewed towards the 48% noted among 65-74 year olds.

**DAB ownership is comparable or higher than among non-disabled people, across most age bands.**

DAB household penetration among people with hearing impairments is comparable with the figure for non-disabled adults (28% vs. 26%). Within single-person (disabled-only) households, DAB penetration is at around a fifth (19%); comparable with non-disabled single-person households.

**Figure 1.53 Household DAB ownership, by age and household size: hearing impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, hearing impairment: 506

\*Data for hearing impairment 35-54 and 55-64 indicative only as sample below 100 (70 and 89)

\*\*Data for hearing impairment 15-34 not presented as sample below 50 (45)



## Section 7

# People with visual impairment

## Introduction

This section looks at people with visual impairment in more detail. It details the services and devices that they have access to and provides more information on the impact of demographics and other factors. People with visual impairments accounted for one in ten (9%) of the sample of disabled consumers. Two-thirds of people with multiple impairments have a visual impairment.

Due to the relatively low incidence, and consequently lower sample size, of people with a visual impairment only, the analysis in this section is more limited than for other types of disability.

## Key trends

- **People with a visual impairment have higher ownership levels of some devices and services than the average across the total disabled sample.** People with a visual impairment have higher levels of home smartphone ownership (33%), home PC ownership (65%) and personal internet access (62%) than the average among disabled people (27%, 59% and 55% respectively). This can partly be explained by their larger household size, although the levels remain lower than the average for non-disabled consumers.
- **Factors other than age and SEG play a role in limiting internet access for some people with a visual impairment.** Despite higher levels of internet access compared to the average among disabled people, levels remain lower than for non-disabled consumers. The smallest difference between internet access levels is among non-disabled and visually impaired people aged under 65 in socio-economic group ABC1 (96% and 89% respectively). However, among C2DEs (regardless of age) and older ABC1s, differences in access levels become more marked (at least 13 percentage points) suggesting that other factors are playing a role in limiting internet access for these people, or that their disability is compounding the age and SEG effects.
- **People with a visual impairment have a higher-than-average propensity to use the internet for social networking and job searching,** reflecting the younger profile of this disability type. Fifty three per cent use the internet for social networking, compared with the 45% disabled average and the 55% non-disabled average. Twenty five per cent use internet job searching (compared with the 16% disabled average and the 22% non-disabled average).
- **Pay TV levels are lower overall in homes with visually-impaired adults.** Forty four per cent of visually impaired adults live in a home with pay TV, compared with 55% of non-disabled adults.

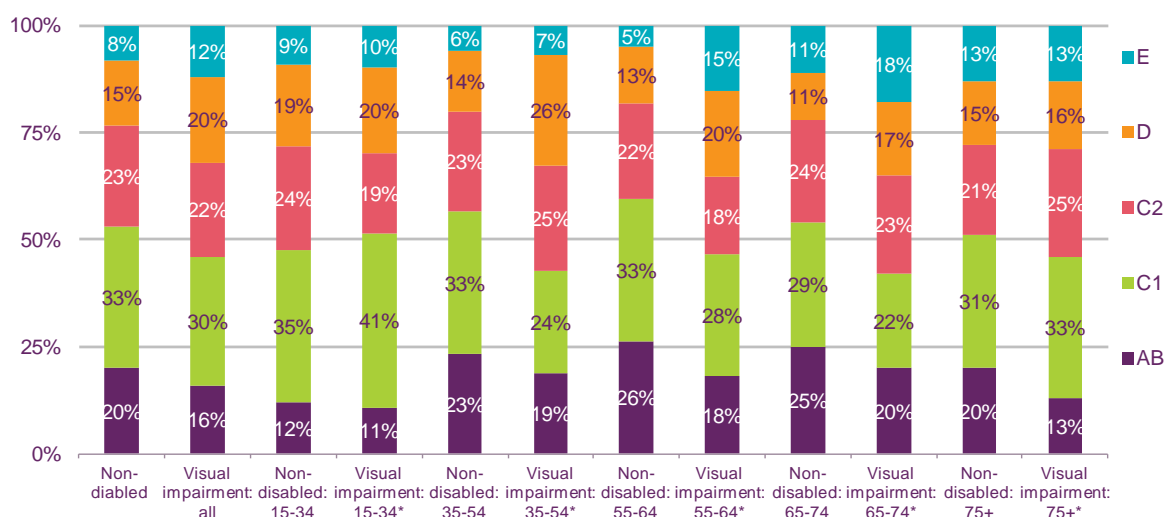
## Profile

### Younger people with visual impairments have a similar socio-economic group profile to non-disabled people

People with visual impairment are younger than the average for disabled people (22% are aged 34 or less compared with the 10% average). A fifth (21%) are aged 75+, compared with the 28% non-disabled average.

Analysis of the age and SEG profile of visually impaired people indicates that those aged 15-34 and 75+ have a similar socio-economic profile to non-disabled consumers in these age groups. However, higher proportions of each of the middle age bands are in socio-economic groups DE.

Figure 1.54 Profile of people with visual impairment and non-disabled people, by socio-economic group within age



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, visual impairment: 367, non-disabled 15-34: 6178, visual impairment 15-34: 81\*, non-disabled 35-54: 5674, visual impairment 35-54: 85\*, non-disabled 55-64: 2544, visual impairment 55-64: 65\*, non-disabled 65-74: 1978, visual impairment 65-74: 60\*, non-disabled 75+: 1006, visual impairment 75+: 76\*

\*Data indicative only as sample below 100

As shown in Section 3, people with visual impairment only are the most likely of all the disability groups to be working: 33% compared with 17% average among disabled people. However, this is still lower than for non-disabled people (53%). For visually impaired people of working age (i.e. under 65) the proportion in work rises to 50%, compared with 63% for the average among non-disabled people, and 30% average among disabled people<sup>17</sup>.

<sup>17</sup> Data from the RNIB suggest that the proportion of people registered as blind are significantly less likely to be working than the total sample of 'visually impaired' people analysed in this report.

## Ownership overview

### People with visual impairment have higher levels of ownership of some services, at least partly driven by their living in larger households

People with visual impairment have higher levels of smartphones in the home (33%), home PC ownership (65%) and personal internet access (62%) than average among disabled people (27%, 59% and 55% respectively). But these levels remain lower than the average for non-disabled consumers.

Figure 1.55 Household device/service ownership overview: visual impairment

	Non-disabled	All disabled	Visual impairment
Fixed Line	74%	79%	72%
Any mobile	87%	81%	80%
Smartphone	48%	27%	33%
PC	79%	59%	65%
Internet access*	83%	55%	62%
Tablet	17%	10%	11%
Pay TV	55%	46%	44%
Freeview/Sat	53%	64%	62%
DAB	26%	21%	20%

Source: British Population Survey, 2012: July – September 2012

Base: non-disabled: 17,412, all disabled: 4,095, visual impairment: 367

\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.

As reported in Section 3, people with visual impairment only are most likely to live in a household with three or more people (35% vs. 22% average among disabled and 50% among non-disabled people). Given that ownership of communications services tends to be higher among larger households, this partly explains the higher ownership levels among people with visual impairments.

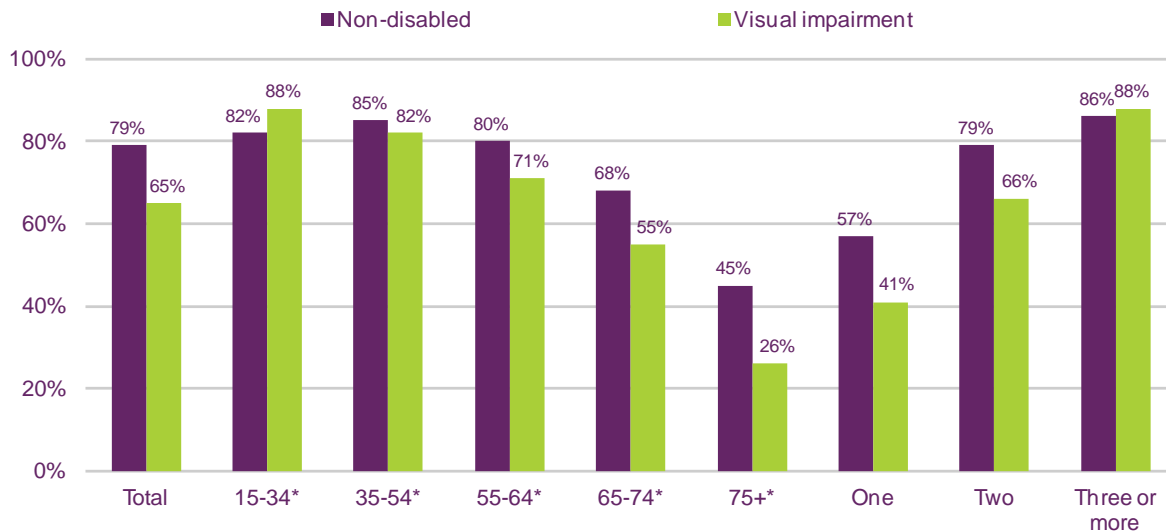
## Focus on internet

### PC and internet access levels for younger visually impaired people in socio-economic group AB are similar to those for non-disabled people in this demographic

Home PC ownership by age among the visually impaired broadly tracks incidence among non-disabled people, with younger people, and people living in larger households, more likely to have a PC at home. Ownership levels are comparable between non-disabled and people with a visual impairment up to the age of 54, at which point ownership falls below that of non-disabled people.

The impact of household size can also be seen in the chart below; ownership of PCs in larger households of people with visual impairments is equal to that for larger non-disabled households. This will pull up the average for this group of consumers. However, in single-person (disabled-only) households, ownership among people with visual impairment is below that for non-disabled single-person households (41% vs. 57%).

**Figure 1.56 Household PC ownership, by age and household size: visual impairment**



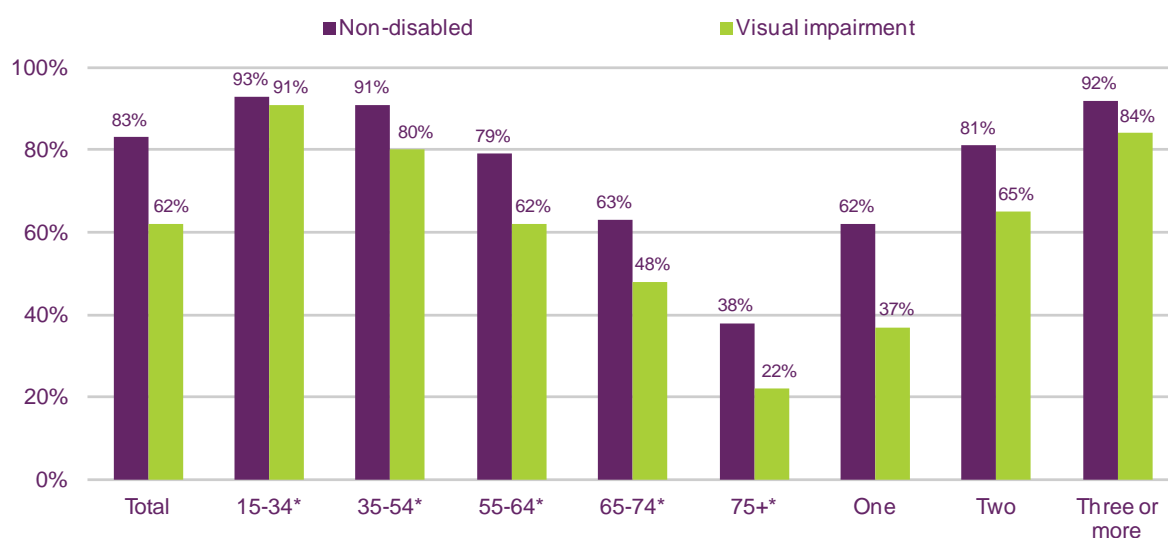
Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, visual impairment: 367

\*Data for visual impairment 15-34 (81), 35-54 (85), 55-64 (65) 65-74 (60) and 75+ (76) indicative only as sample below 100

Similarly, internet access is broadly comparable among younger people with a visual impairment, although access levels begin to drop off from age 35.

Figure 1.57 Personal internet access, by age and household size: visual impairment



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, visual impairment: 367

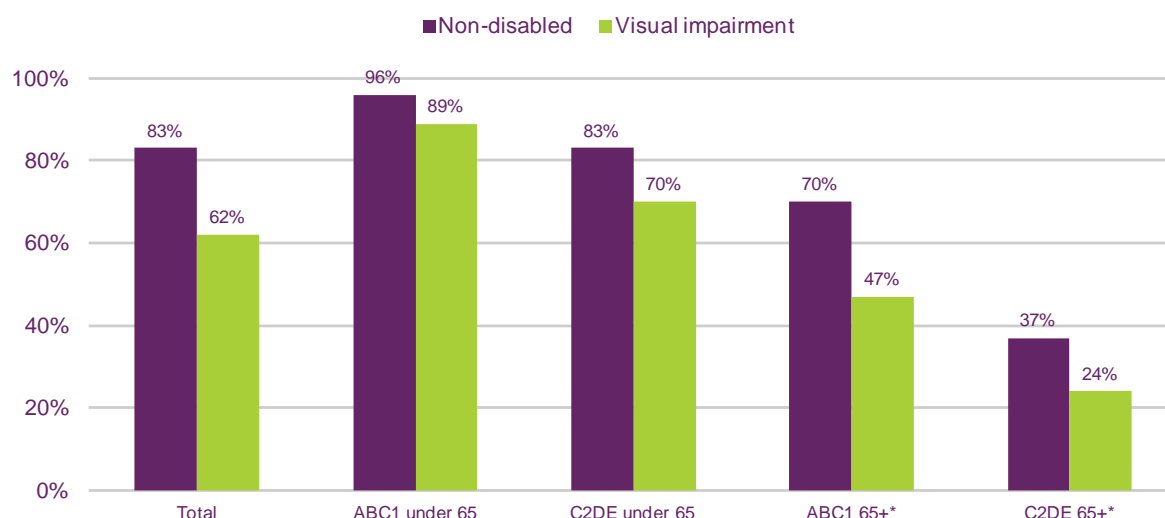
\*Data for visual impairment 15-34 (81), 35-54 (85), 55-64 (65) 65-74 (60) and 75+ (76) indicative only as sample below 100

### Factors other than age and SEG are limiting internet access for some people with visual impairment.

Despite higher levels of internet access compared to the average among disabled people, levels remain lower than for non-disabled consumers. The smallest difference in internet access levels between non-disabled and visually impaired people aged under 65 is in socio-economic group ABC1 (at 96% and 89% respectively).

However, among C2DEs (regardless of age) and older ABC1s, differences in access levels become more marked (at least 13 percentage points), suggesting that other factors are limiting internet access for these people, or that their disability is compounding the age and SEG effects. However, as sample sizes are relatively low, please treat this analysis as indicative only.

**Figure 1.58 Personal internet access, by combined age and socio-economic group: visual impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled - all: 17,412, visual impairment - all: 367

\*Data for visual impairment indicative only as sample below 100

**People with a visual impairment with internet access have a higher-than-average propensity to use the internet for social networking and job searching.**

People with a visual impairment are the most likely group to access the internet in locations outside the home or via a mobile device, probably a reflection of their younger age profile and working status. Thirty per cent of people with a visual impairment, who have internet access, access the internet from a location other than the home, compared with 19% of all disabled people and 36% of non-disabled people. This is predominantly from work, school or university (28%). Twenty-nine per cent access the internet via a mobile device, compared with 23% of all disabled and 35% of non-disabled people.

Most people with visual impairments with internet access have been using the internet for more than six years; comparable to the average among all disabled people (64% vs. 68%). However, they appear to be more frequent users - 66% claim to access the internet more than once a day, compared with the average among disabled people of 52%.

People with a visual impairment use the internet for the same types of activities as people with other disabilities and non-disabled people. They have a higher-than-average propensity to use the internet for social networking (53% compared with 45% for all disabled and 55% non-disabled), and job searching (25% compared with 16% all disabled and 22% non-disabled). The younger profile of people with a visual impairment accounts for the higher-than-average access levels.

Figure 1.59 Internet activities, by type of disability

		Non-disabled	All disabled	Mobility impairment	Hearing impairment	Visual impairment	Multiple impairments
Type of internet usage	Email	92%	86%	84%	92%	86%	84%
	Information	89%	85%	84%	85%	83%	82%
	Shopping	66%	61%	59%	63%	60%	59%
	Social networking	55%	45%	44%	36%	53%	40%
	Banking	53%	45%	41%	46%	49%	43%
	AV Entertainment	39%	31%	25%	30%	33%	25%
	Job search	22%	16%	12%	14%	25%	8%
	Gaming/gambling	18%	16%	15%	12%	18%	13%

Source: British Population Survey, 2012: July - September 2012

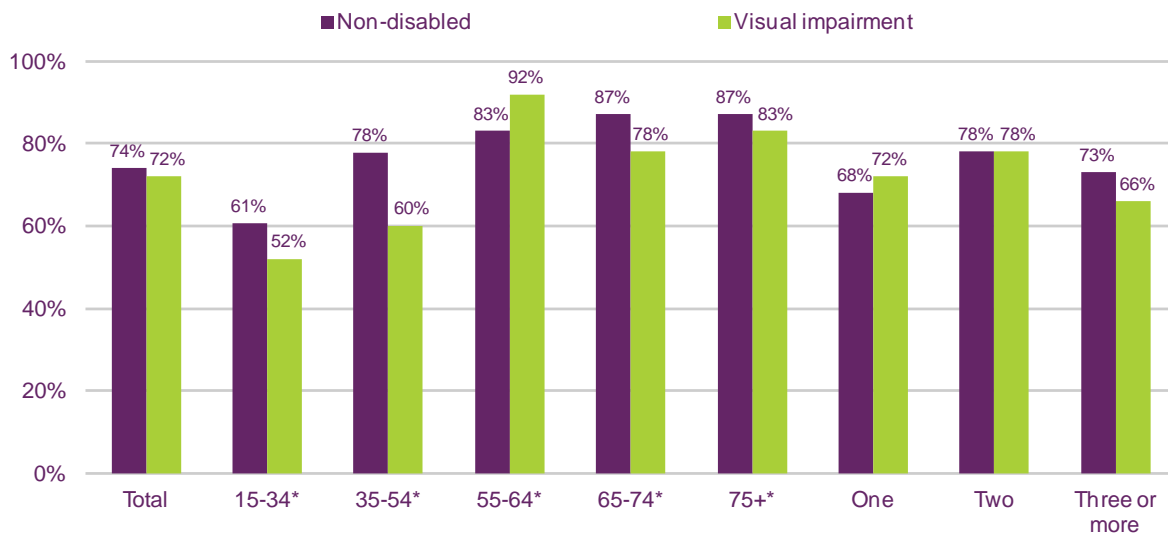
Base: all with internet access; non-disabled: 14,539, all disabled: 2252, mobility impairment: 529, hearing impairment: 322, visual impairment: 228, multiple impairments: 262

## Focus on telecoms

### Home fixed-line ownership is broadly comparable between people with a visual impairment only and non-disabled people

People with a visual impairment only are less likely to have a fixed line at home, compared to the average for disabled people: 72% vs. 79%. Levels are comparable with non-disabled people. There are few differences by age group, apart from lower fixed-line ownership among the youngest age groups. Single-person (disabled-only) households are as likely as larger households to have a fixed line.

**Figure 1.60 Household fixed-line ownership, by age and household size: visual impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, visual impairment: 367

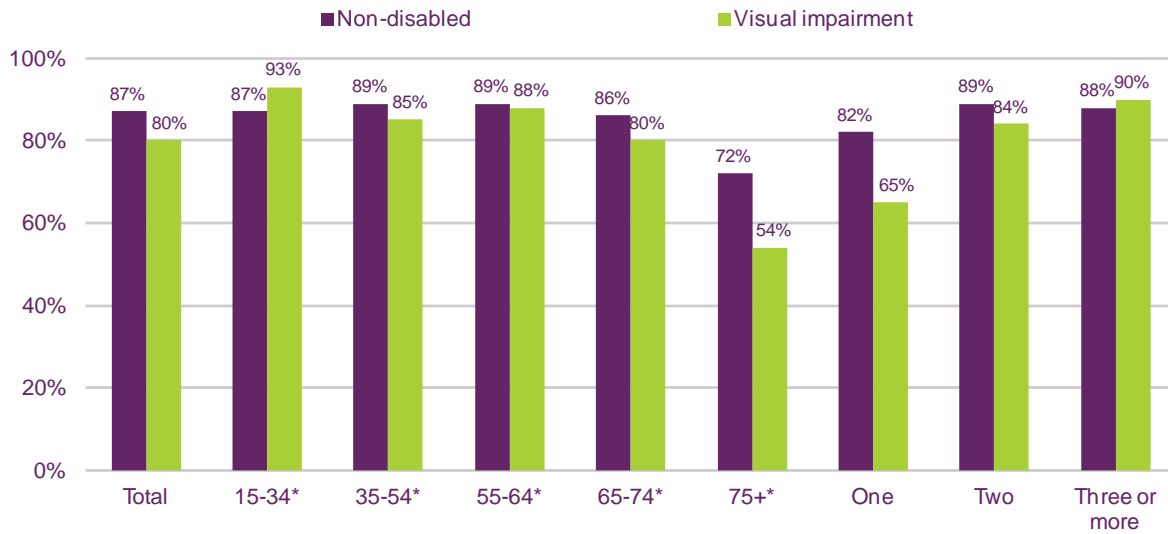
\*Data for visual impairment 15-34 (81), 35-54 (85), 55-64 (65) 65-74 (60) and 75+ (76) indicative only as sample below 100

### **Most visually impaired people have a mobile phone in the home, and two thirds of those who live alone personally have a mobile**

Household mobile phone ownership among visually impaired people is widespread for all age groups other than 75 and over. Eighty per cent of all visually impaired people have a mobile phone in the household but this drops to 54% of people aged 75 or over. Mobile phone ownership within single- person (disabled-only) homes is below average, at 65%.



**Figure 1.61 Household mobile phone ownership, by age and household size: visual impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, visual impairment: 367

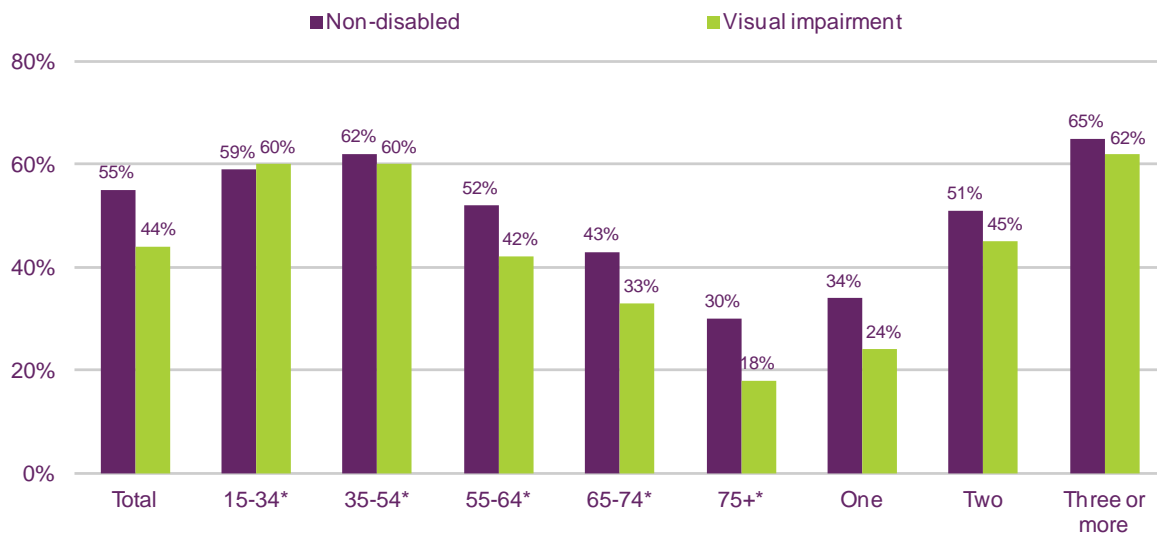
\*Data for visual impairment 15-34 (81), 35-54 (85), 55-64 (65), 65-74 (60) and 75+ (76) indicative only as sample below 100

## Focus on broadcast

### Pay-TV levels are lower overall in homes with visually impaired adults

Pay TV levels are lower overall in homes with visually impaired adults than levels for non-disabled adults: 44% compared with 55%. Incidence levels are comparable up to age 54 but drop below the non-disabled average at 55+. Incidence is also lower in single- and two-person households, which tend to be older.

**Figure 1.62 Household pay-TV ownership, by age and household size: visual impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, visual impairment: 367

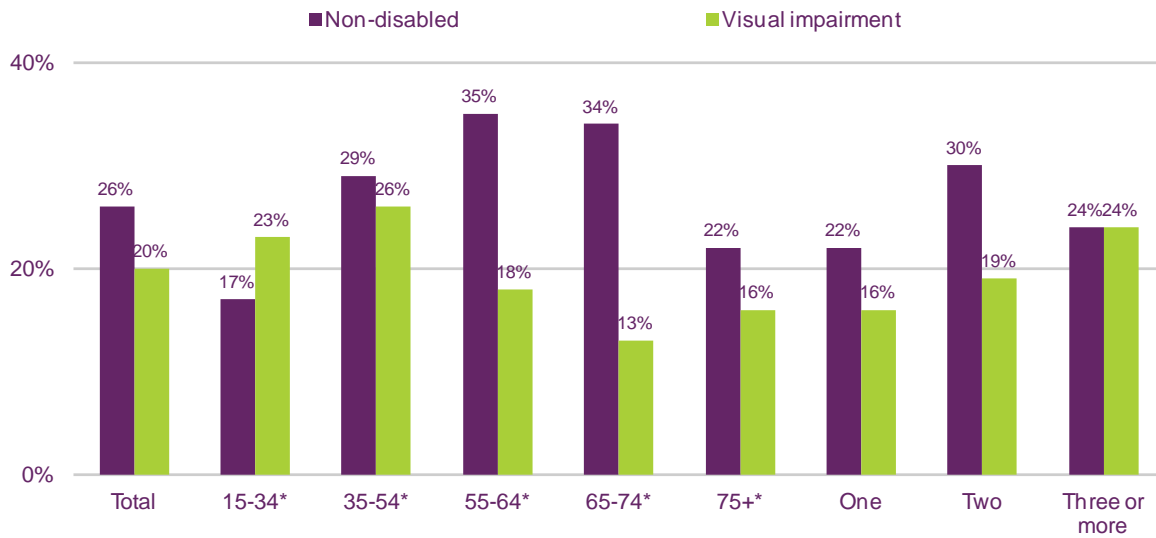
\*Data for visual impairment 15-34 (81), 35-54 (85), 55-64 (65), 65-74 (60) and 75+ (76) indicative only as sample below 100

Pay-TV ownership is lower for all SEG bands, with the largest difference seen for AB adults: 47% of visually impaired AB adults have pay TV, compared with 59% of non-disabled adults.

### **DAB ownership is highest among younger people with visual impairment**

A fifth (20%) of people with visual impairment have a DAB radio in their households. Ownership is lower than among non-disabled people (26%); this is driven by lower ownership among older age groups.

Figure 1.63 Household DAB access, by age and household size: visual impairment



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, visual impairment: 367

\*Data for visual impairment 15-34 (81), 35-54 (85), 55-64 (65), 65-74 (60) and 75+ (76) indicative only as sample below 100

## Section 8

# People with multiple impairments

## Introduction

This section looks at people with multiple impairments in more detail. It covers the services and devices they have in their home, or have access to, and provides more information on the impact of demographics and other factors.

Thirteen per cent of the sample had multiple impairments: i.e. at least two of the following impairments: mobility, hearing and vision. The largest sub-set of this group (one-third) had all three of these types of impairment.

## Key trends

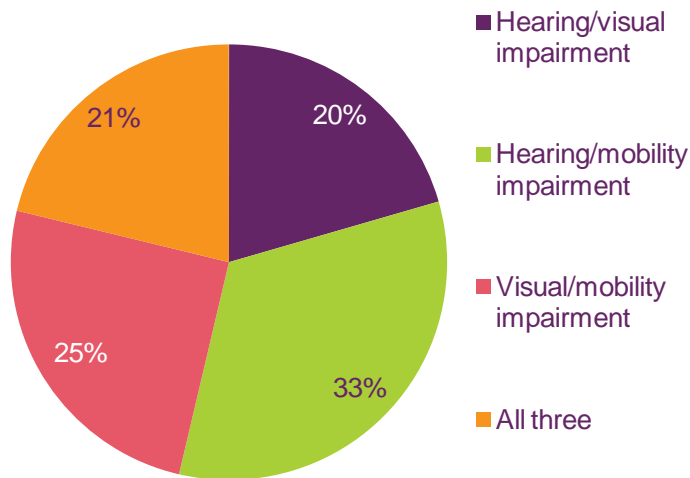
- **Particularly among older consumers with mobility impairments, aspects other than age and socio-economic group appear to be limiting levels of internet access.** People with multiple disabilities are the least likely to have internet access; this is largely a reflection of their older age profile and the higher proportion in socio-economic group DE. However, even among the younger (under-65) ABC1s, internet access is lower than for non-disabled people in this demographic group. The differences are larger among C2DEs across both broad age groups, and among older people with multiple impairments.
- **Internet users with multiple impairments access the internet less frequently than non-disabled people.** But younger people with multiple impairments access the internet more frequently than the average for this group, as do people in larger households.
- **Household mobile ownership is more widespread than fixed-line ownership among people aged 35-64 with multiple impairments**

## Profile

**People with multiple impairments are the most likely group to be older, and to be in lower SEG bands.**

Thirteen per cent of the total sample of disabled people said they had multiple impairments, i.e. at least two of the following impairments: mobility, hearing and vision.

Figure 1.64 Profile of people with multiple impairments, by type



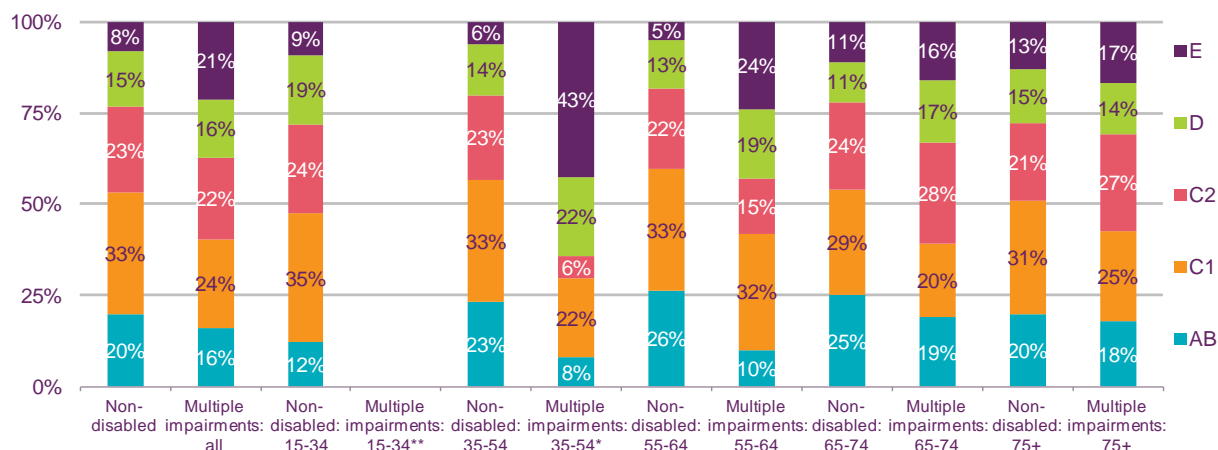
Source: British Population Survey, 2012: July - September 2012  
Base: all with multiple impairments: 636

### People with multiple impairments are most likely to be in socio-economic groups DE

As shown in Section 3, people with multiple impairments are the most likely disabled group to be aged over 75: half (49%) of this group are aged 75 and over, compared with 28% for the disabled average and 6% of non-disabled adults. Seventy per cent are aged over 65 compared with 49% of all disabled people and 17% of non-disabled people.

Adults with multiple impairments are also more likely than non-disabled people to be in socio-economic group DE (37% vs. 23%). The difference is most marked among people aged under 64.

**Figure 1.65 Profile of people with multiple impairments, and non-disabled, by SEG within age**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, multiple impairments: 636, non-disabled 15-34: 6178, non-disabled 35-54: 5674, multiple impairments 35-54: 65\*, non-disabled 55-64: 2544, multiple impairments 55-64: 113, non-disabled 65-74: 1978, multiple impairments 65-74: 131, non-disabled 75+: 1006, multiple impairments 75+: 309

\*Data indicative only as sample below 100

\*\*Data not included as sample below 50

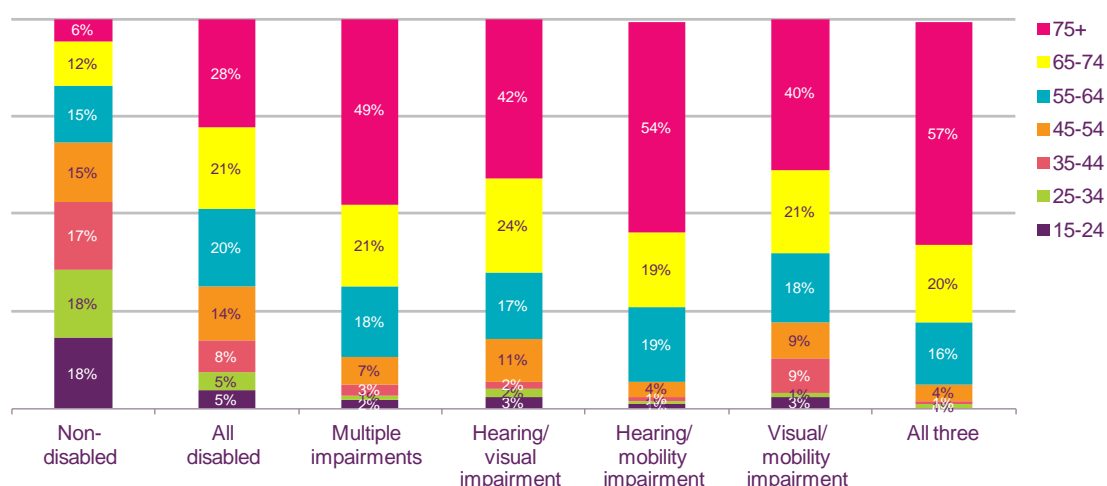
Also reported in Section 3, people with multiple impairments are the least likely to be working: 8% compared with the average of 17% for disabled people overall. This reflects the older age profile of this group and is consistent with the higher proportion in retirement (75%) compared to the average for disabled people (55%). Among those of working age, people with multiple impairments (aged under 65) are most likely to say they are 'not working due to illness or disability' (42%).

### People with hearing, visual and mobility impairments are the oldest, and those with visual impairments tend to be younger.

The following charts compare the demographic profiles of people with different combinations of impairment.

When looking at the types of multiple impairment by age, people who have all three are the oldest, followed by people with both hearing and mobility impairment.

Figure 1.66 Profile of people with multiple impairments, by type and age

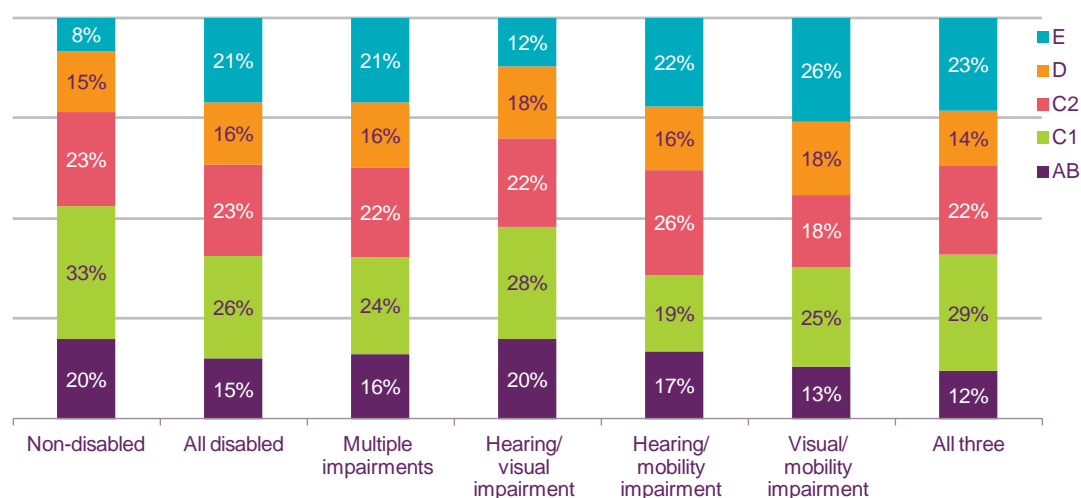


Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, all disabled: 4,095, multiple impairments: 1,134, hearing/visual impairment: 130, hearing/mobility impairment: 213, visual/mobility impairment: 159, all three: 134

People with multiple impairments have a broadly similar socio-economic profile to the overall disability profile. There are some differences by impairment type; people with mobility impairment in addition to other impairments are more likely than those without to fall into the socio-economic group E.

Figure 1.67 Profile of people with multiple impairment, by type and by socio-economic group



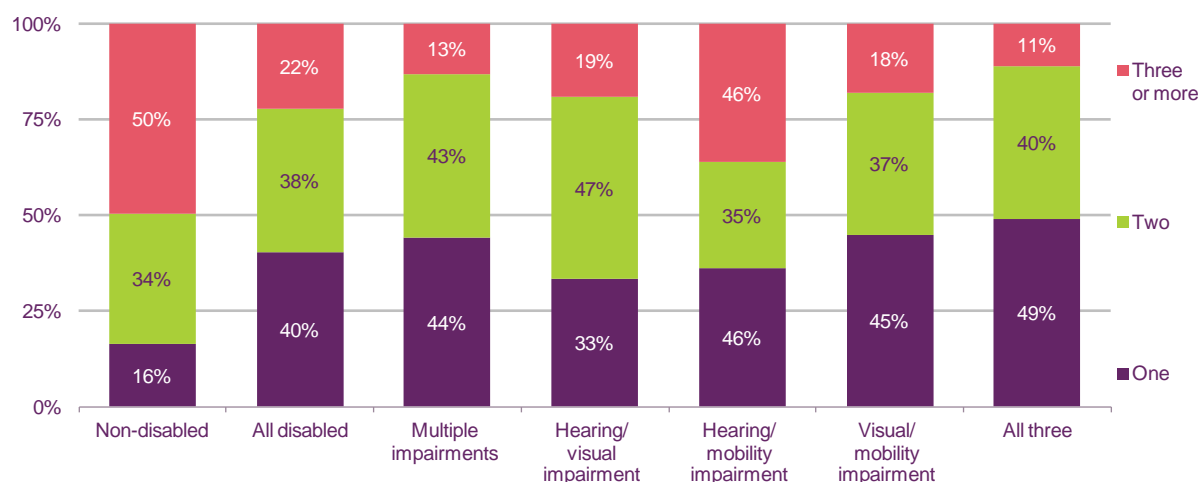
Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, all disabled: 4,095, multiple impairments: 1,134, hearing/visual impairment: 130, hearing/mobility impairment: 213, visual/mobility impairment: 159, all three: 134

### People with multiple impairments are more likely to live alone, perhaps a reflection of their older profile.

People with multiple impairments are the least likely disability group to live in larger households, perhaps a reflection of their older age profile. More than two in five (44%) live alone, compared to 16% among non-disabled people. This rises to half (49%) among people with three types of impairment.

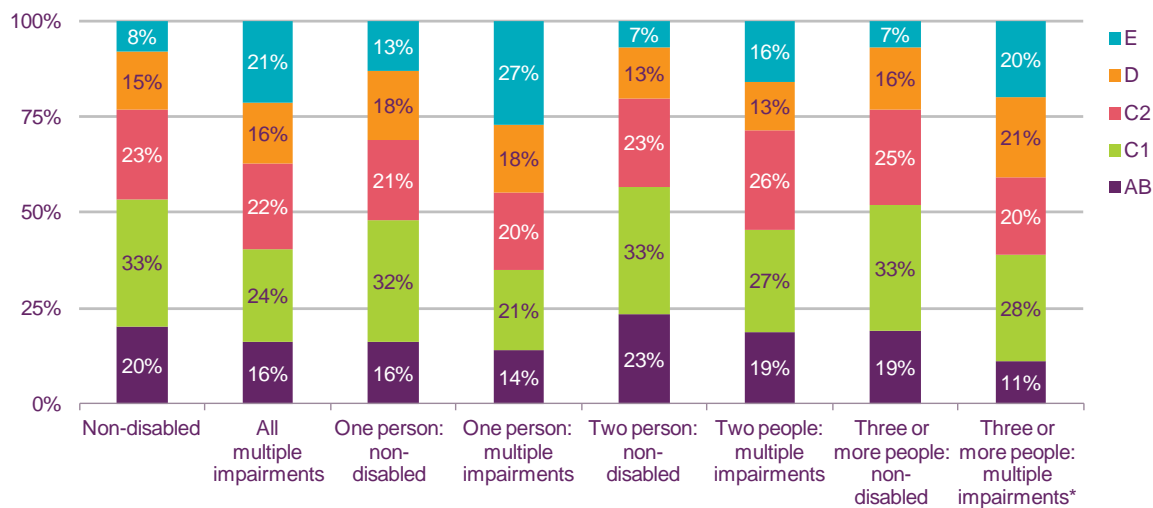
**Figure 1.68 Multiple impairment type, by number within household**



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, all disabled: 4,095, multiple impairments: 1,134, hearing/visual impairment: 130, hearing/mobility impairment: 213, visual/mobility impairment: 159, all three: 134

Regardless of household size, any household with a person with multiple impairments is more likely to be in socio-economic group DE. Those living alone are the most likely to fall into this socio-economic group, 45% vs. 31% among single-person non-disabled households.

**Figure 1.69 Multiple impairment: impact of household size and SEG**



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, multiple impairments: 636, non-disabled one person household: 2843, multiple impairments one person household: 277, non-disabled two person household: 5872, multiple impairments two person household: 273, non-disabled three or more person household: 8607, multiple impairments three or more person household: 85\*  
 \*Data indicative only as sample below 100



## Ownership overview

### People with multiple impairments have higher levels of fixed-line ownership but mobile and PC ownership, and internet access are lower than average

People with multiple impairments have higher levels of fixed-line ownership in the home (83% compared to 79% average among disabled people and 74% among non-disabled people). To some extent this will reflect the older age profile of these consumers, as older people tend to be more likely than younger adults to have a fixed line.

However, household ownership of mobile phones and personal access to the internet are lower among people with multiple impairments than among people with other types of disability.

Figure 1.70 Household device/service ownership overview: multiple impairment

	Non-disabled	All disabled	Multiple impairments - all	Hearing/visual impairments	Hearing/mobility impairments	Visual/mobility impairments	All three
Fixed Line	74%	79%	83%	78%	84%	86%	85%
Any mobile	87%	81%	75%	78%	77%	73%	72%
Smartphone	48%	27%	17%	22%	15%	19%	10%
PC	79%	59%	51%	53%	50%	52%	49%
Internet access*	83%	55%	41%	45%	43%	43%	33%
Tablet	17%	10%	5%	7%	3%	5%	5%
Pay TV	55%	46%	43%	42%	40%	48%	43%
Freeview/Sat	53%	64%	66%	63%	64%	62%	63%
DAB	26%	21%	19%	28%	17%	18%	16%

Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, all disabled: 4,095, multiple impairments: 636, hearing/visual impairments: 130, hearing/mobility impairments: 213, visual/mobility impairments: 159, all three: 134

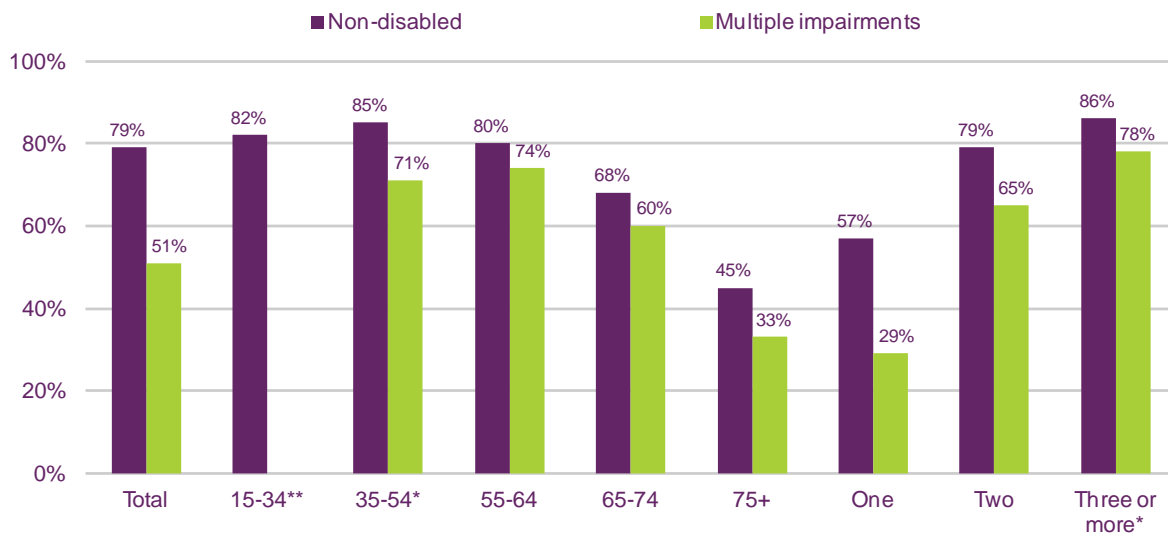
\*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual ownership.

## Focus on internet

### PC ownership is lower than average among older and C2DE socio-economic groups with multiple impairments.

Household PC ownership is significantly lower among people with multiple impairments than among non-disabled people: 51% compared to 79%. Ownership is highest among those aged 35-64 and lowest among those aged 75+ (33%). Single-person (i.e. disabled-only) households are the least likely to own a PC (29%).

**Figure 1.71 Household PC ownership, by age and household size: multiple impairment**



Source: British Population Survey, 2012: July - September 2012

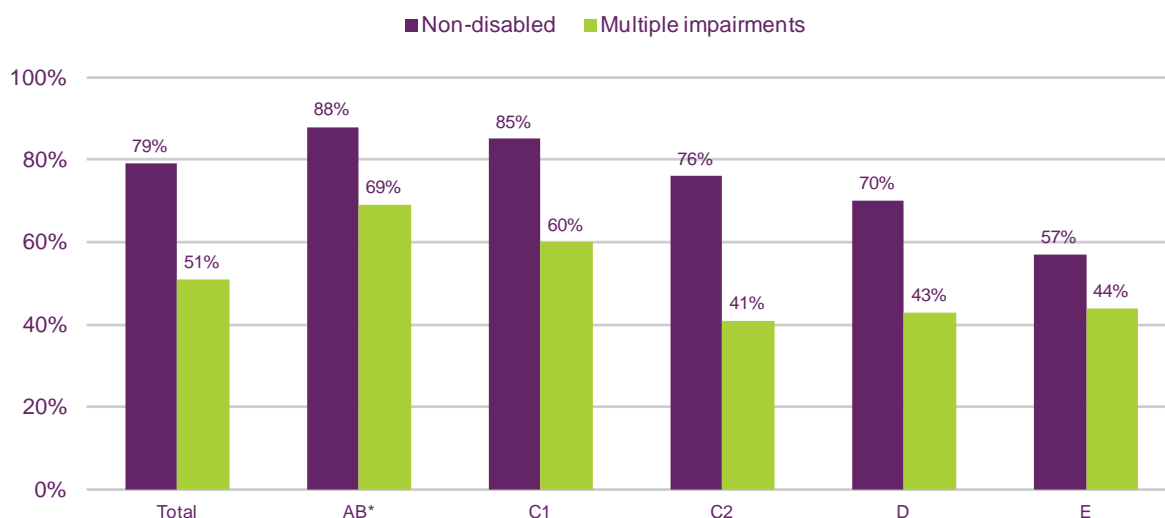
Base: non-disabled: 17,412, multiple impairments: 636

\*Data for multiple impairments 35-54 (65) and multiple impairments three or more person household (85) indicative only as sample below 100

\*\*Data for multiple impairments 15-34 excluded as sample below 50 (18)

In terms of socio-economic group, incidence is highest among AB and C1s. The largest differences between non-disabled people and those with multiple impairments can be seen in the C2 and D groups.

**Figure 1.72 Household PC ownership, by socio-economic group: multiple impairment**



Source: British Population Survey, 2012: July - September 2012

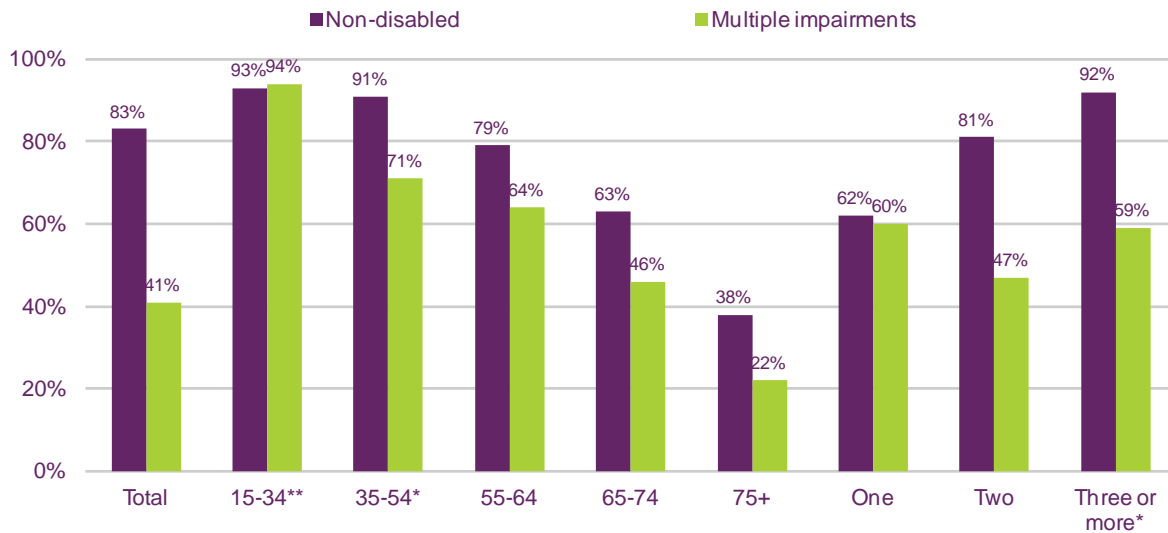
Base: non-disabled: 17,412, multiple impairments: 636

\*Data for multiple impairments AB indicative only as sample below 100 (99)

**Age and socio-economic group have a bearing on internet access, but other factors also appear to be limiting take-up, particularly among older consumers**

People with multiple impairments are the least likely of all the disability groups to have internet access: 41% compared with an average of 55% for all disabled adults and 83% of people with no disability.

**Figure 1.73 Personal internet access, by age and household size: multiple impairment**



Source: British Population Survey, 2012: July - September 2012

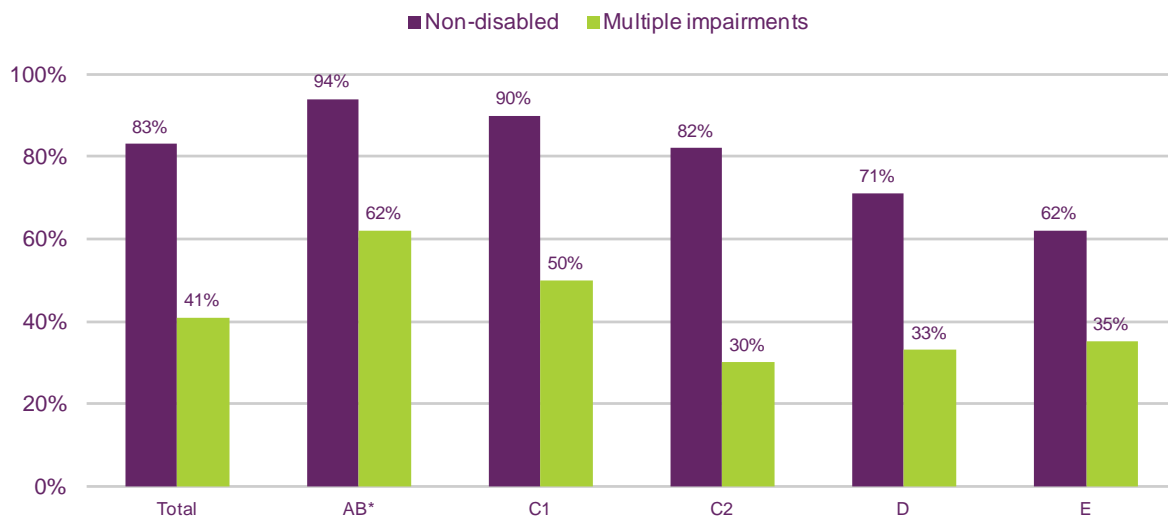
Base: non-disabled: 17,412, multiple impairments: 636

\*Data for multiple impairments 35-54 (65) and three or more person household (85) indicative only as sample below 100

\*\*Data for multiple impairments 15-34 excluded as sample below 50 (18)

As with the general trend in internet access, access is lower among those in socio-economic groups DE.

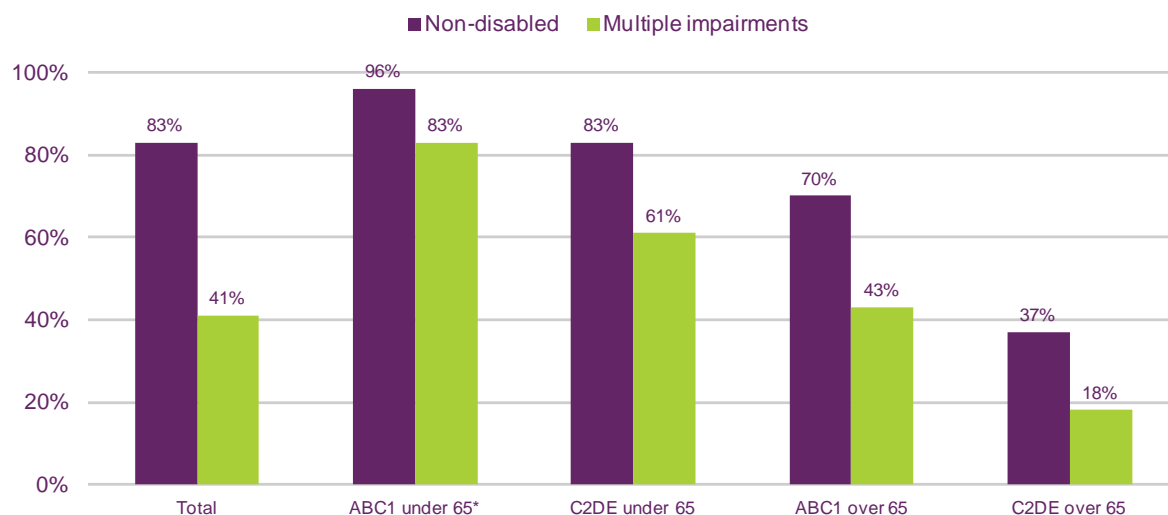
**Figure 1.74 Personal internet access, by socio-economic group: multiple impairment**



Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, multiple impairments: 636  
 \*Data for multiple impairments AB indicative only as sample below 100 (99)

As noted above, while age and SEG have a bearing on propensity to have internet access, multiple impairment appears to be an additional inhibitor, particularly for older people and people in lower SEG bands. For example, people with multiple impairments aged under 65 in socio-economic group AB are significantly less likely than non-disabled people in the same demographic group to have access to the internet (83% vs. 96%). The differences are more marked among older people. These figures reflect access only, not usage levels.

**Figure 1.75 Personal internet access, by combined age and socio-economic group: multiple impairment**



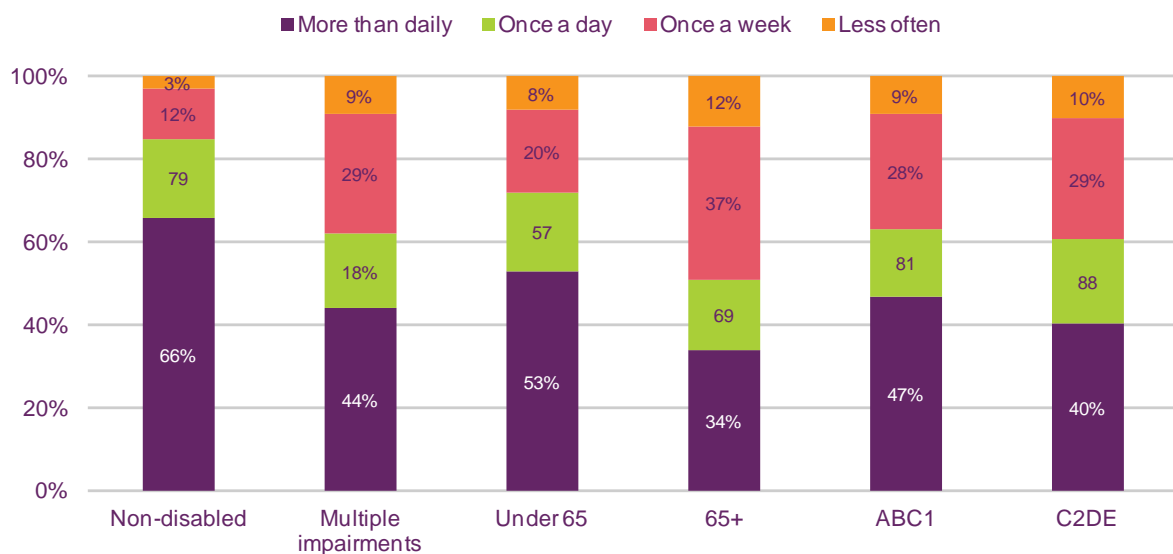
Source: British Population Survey, 2012: July - September 2012  
 Base: non-disabled: 17,412, multiple impairments: 636, non-disabled ABC1 under 65: 7,650, multiple impairment ABC1 under 65: 70\*, non-disabled C2DE under 65: 6,746, multiple impairments C2DE under 65: 126, non-disabled ABC1 over 65: 1607, multiple impairments ABC1 over 65: 184, non-disabled C2DE over 65: 1409, multiple impairments C2DE over 65: 256  
 \*Data indicative only as sample below 100 (70)

## People with multiple impairments who have internet access, access the internet less frequently than non-disabled people.

People with multiple impairments who have internet access access the internet less frequently than non-disabled people: 44% claim to do so more than once a day, compared with the disabled average of 52% and 66% for non-disabled adults.

It is evident that younger people are accessing the internet more frequently, as are people in larger households.

**Figure 1.76 Frequency of internet access, by broad age, socio-economic group and household size: multiple impairment**



Source: British Population Survey, 2012: July - September 2012

Base: all with internet access: non-disabled: 14,539, multiple impairments: 262, multiple impairments under 65: 135, multiple impairments over 65: 127, multiple impairments ABC1: 138, multiple impairments C2DE: 124

People with multiple impairments use the internet for the same types of activities as people with other disabilities and non-disabled people, as shown in Section 4. There are indications that ABC1 internet users with multiple impairments are more likely than C2DEs with multiple impairments to use the internet for email, searching for information and transactional activities such as shopping and banking. But they are no more likely to use the internet for AV activities or job searching, which appeal more to younger people.

Older people (65+) with multiple impairments are less likely than those aged under 65 to use the internet for transactional activities such as grocery (6% vs. 25%) or general shopping (51% vs. 67%).

**Figure 1.77 Internet use, by broad age and socio-economic group: multiple impairment**

		Multiple impairments - all	Under 65	65+	ABC1	C2DE
Type of internet usage	Email	84%	81%	87%	93%	74%
	Information	82%	85%	79%	87%	77%
	Grocery shopping	20%	24%	6%	25%	15%
	Shopping - any	59%	67%	51%	68%	49%
	Social networking	40%	57%	21%	33%	47%
	Banking	43%	48%	37%	53%	31%
	AV entertainment	25%	34%	15%	25%	25%
	Job search	8%	16%	0%	9%	8%
	Gaming/gambling	13%	14%	11%	9%	16%

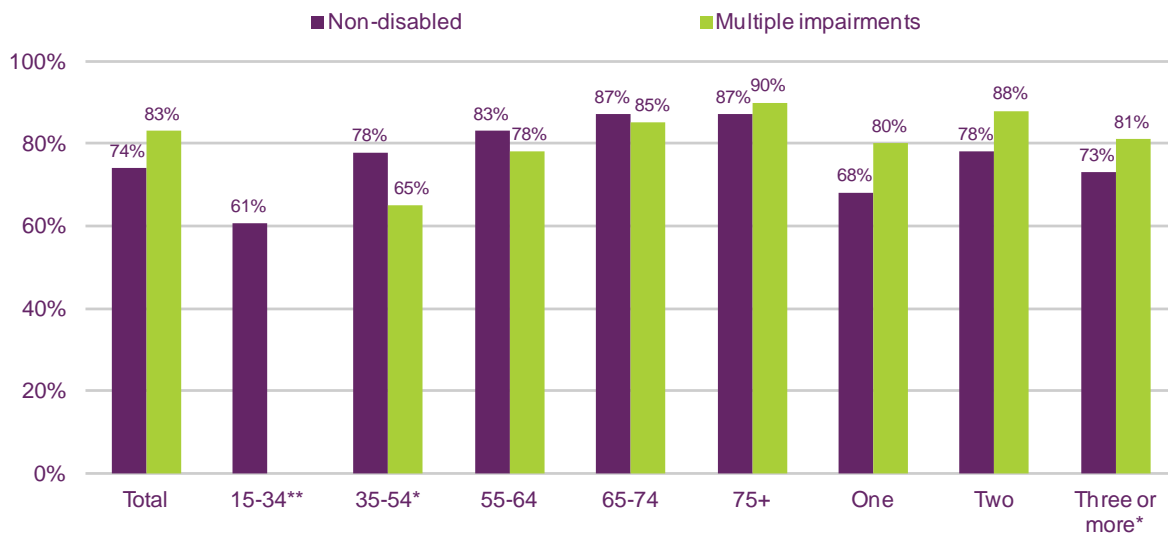
Source: British Population Survey, 2012: July - September 2012  
 Base: all with internet access; multiple impairments – all: 262, multiple impairments under 65: 135, multiple impairments over 65: 127, multiple impairments ABC1: 138, multiple impairments C2DE: 124

### Focus on telecoms

#### Household mobile phone ownership is more widespread than fixed-line ownership among 35-64 year olds with multiple impairments.

People with multiple impairments have a higher-than-average incidence of fixed-line access compared with the average among disabled people: 83% compared with 79%. As with the general trend, incidence increases with age.

**Figure 1.78 Household fixed-line ownership, by age and household size: multiple impairments**



Source: British Population Survey, 2012: July - September 2012

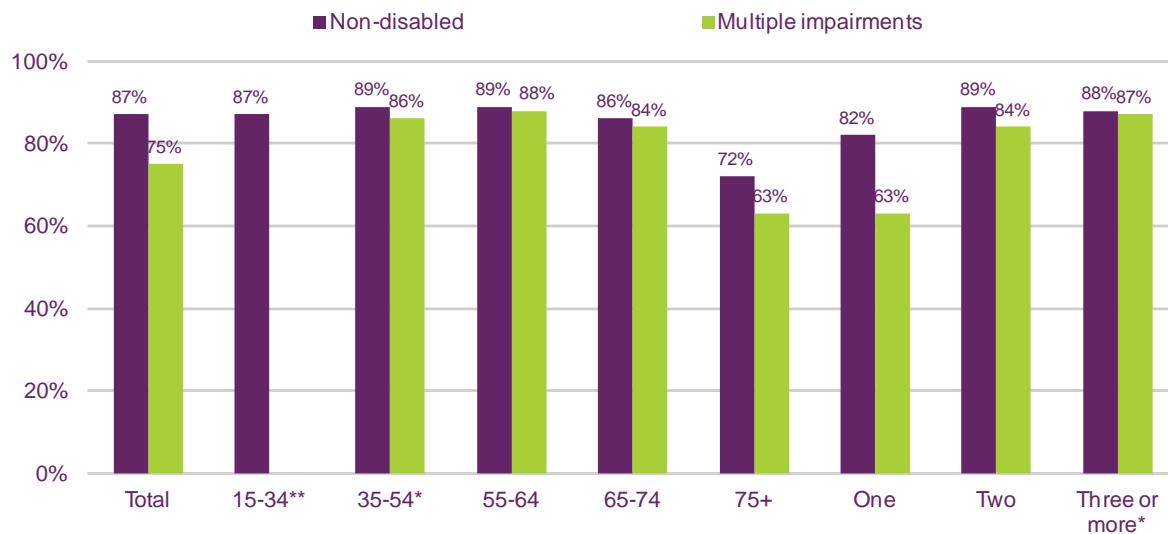
Base: non-disabled: 17,412, multiple impairment: 636

\*Data for multiple impairments 35-54 (65) and three or more person household (85) indicative only as sample below 100

\*\*Data for multiple impairments 15-34 excluded as sample below 50 (18)

Mobile phone home access is broadly comparable between people with multiple impairments and non-disabled people up to age 75, at which point ownership falls off among those with multiple impairments (63% vs. 72%). Within single-person (disabled-only) households, mobile ownership stands at 63% and is likely to reflect the older age profile of these consumers.

**Figure 1.79 Household mobile phone ownership, by age and household size: multiple impairments**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, multiple impairments: 636

\*Data for multiple impairments 35-54 (65) and three or more person household (85) indicative only as sample below 100

\*\*Data for multiple impairments 15-34 excluded as sample below 50 (18)

Despite broadly comparable levels of mobile ownership (with the exception of older people with multiple impairments) smartphone ownership is lower across most age bands.

Among people with multiple impairments, socio-economic group has very little impact on smartphone ownership, which stands at between 13%-19% across the socio-economic groups, highest among ABs.

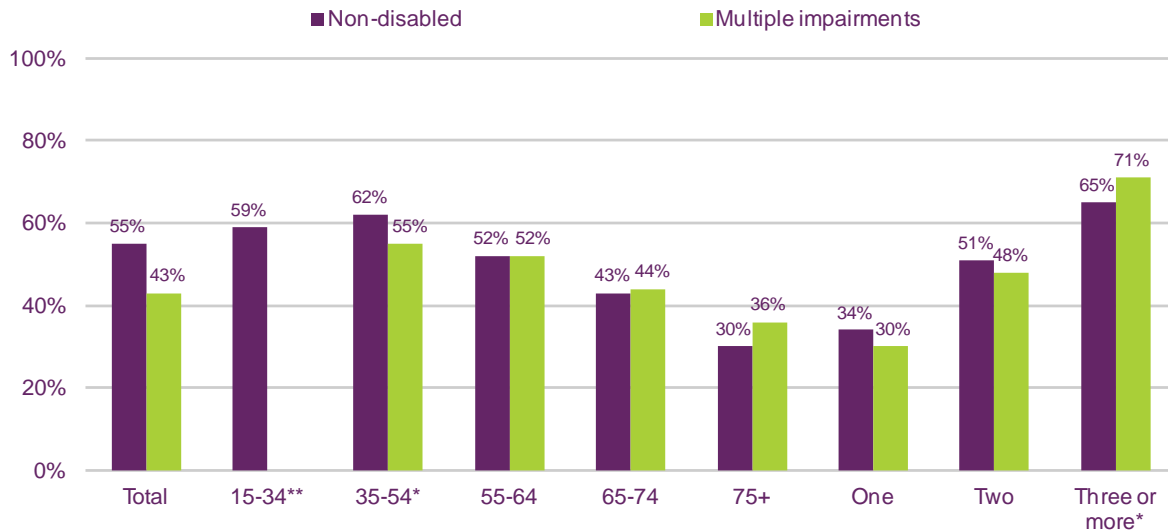
## Focus on broadcast

### Lower pay-TV ownership is driven by the older age profile of people with multiple impairments. Ownership within age groups is broadly comparable

Pay-TV ownership is lower among people with multiple impairments than in households without any disabled adults: 43% vs. 55%. Analysis suggests that this is primarily a reflection of the older age profile of people with multiple impairment, as there are no marked differences by age group or household size, and the patterns of household take-up match those for non-disabled households.



**Figure 1.80 Household pay-TV ownership, by age and household size: multiple impairment**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, multiple impairments: 636

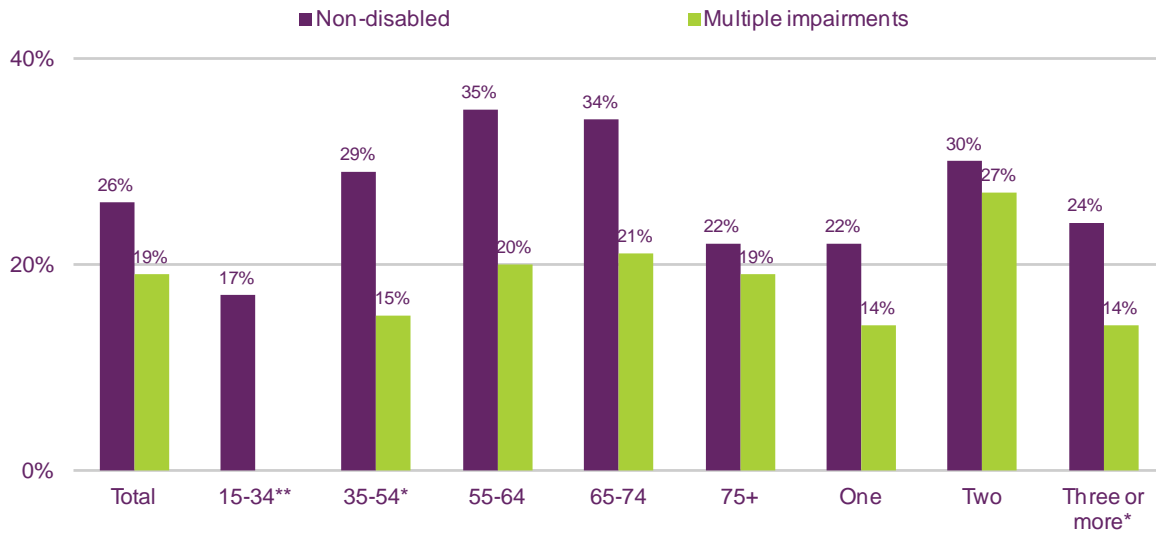
\*Data for multiple impairments 35-54 (65) and three or more person households (85) indicative only as sample below 100

\*\*Data for multiple impairments 15-34 excluded as sample below 50 (18)

### **DAB ownership consistent across age bands but generally lower than among people without a disability at all ages**

DAB ownership is lower among people with multiple impairments than non-disabled people: 19% compared with 26%. The difference is most marked among people aged under 75. In terms of SEG there is little difference in take up between people with multiple impairments and non-disabled adults.

**Figure 1.81 Household DAB access, by age and household size: multiple impairments**



Source: British Population Survey, 2012: July - September 2012

Base: non-disabled: 17,412, multiple impairments: 636

\*Data for multiple impairment 35-54 (65) and three or more person household (85) indicative only as sample below 100

\*\*Data for multiple impairment 15-34 excluded as sample below 50 (18)

## Annex 1

# BPS relevant questions

## 1. Demographics

- Disability: *Whether or not have a disability or long-term illness that impacts on their day-to-day life*
- Type of disability: *Visual impairment; hearing impairment; mobility impairment (wheelchair user; unable to walk far; limited reach); other*
- Gender: *Male; female*
- Age: *15-24; 25-43; 35-44; 45-54; 55-64; 65+ (plus numeric)*
- Number in household: *1; 2; 3; 4; 5+*
- Social grade: *AB, C1, C2, D, E*
- Working status: *Employed (broken by hours worked and self-employed); student/still at school; unemployed and seeking work; retired; not in paid work – other, long term illness or disability, housewife*

## 2. Device/service access

- Does your household have a fixed line? *Yes/No*
- Does your household have a simple mobile phone? *Yes/No*
- Does your household have a web-enabled mobile phone? *Yes/No*
- Does your household have a personal computer? *Yes/No*
- Does your household have a tablet PC? *Yes/No*
- Does your household have satellite TV? *Yes/No*
- Does your household have cable TV? *Yes/No*
- Does your household have Freeview? *Yes/No*
- Does your household have Freesat? *Yes/No*
- Does your household have a DAB radio? *Yes/No*
- Ways you personally access the internet: *Via personal computer at home; via personal computer at work/university/school; at convenient public place; via mobile terminal; via TV set; via games console; No access*

- For how long have you had access to the internet? *Less than 3 months; between 3-6 months; between 6-12 months; between 1-2 years; between 3-4 years; between 4-5 years; between 5-6 years; more than 6 years; don't know (Not asked if no access)*

### **3. Internet usage**

- Which of these best describe your frequency of use of the internet? *Several times a day; Once a day; 4-5 times a week; 2-3 times a week; around once a week; 2-3 times a month; around once a month; less than once a month; never but I have access; never and I do not have access.*
- In the last 3 months, have you used the internet for: Sending emails; information on interests; information on products; online grocery shopping; other online shopping (not groceries); online banking; job searching; playing games online; online gambling; downloading music, downloading video; downloading/streaming TV programmes; online dating; VOIP; social networking; other? (*Codes are yes; no; no access*)

Details of the full questionnaire can be found here:

[http://www.thebps.co.uk/content/files/BPS%20Data%20Catalogue\\_%20November%202012.pdf](http://www.thebps.co.uk/content/files/BPS%20Data%20Catalogue_%20November%202012.pdf)